First Health Services Corporation

VAMMIS

CHANGE MANAGEMENT SYSTEM DSD

Version 1.5

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Document Version Control

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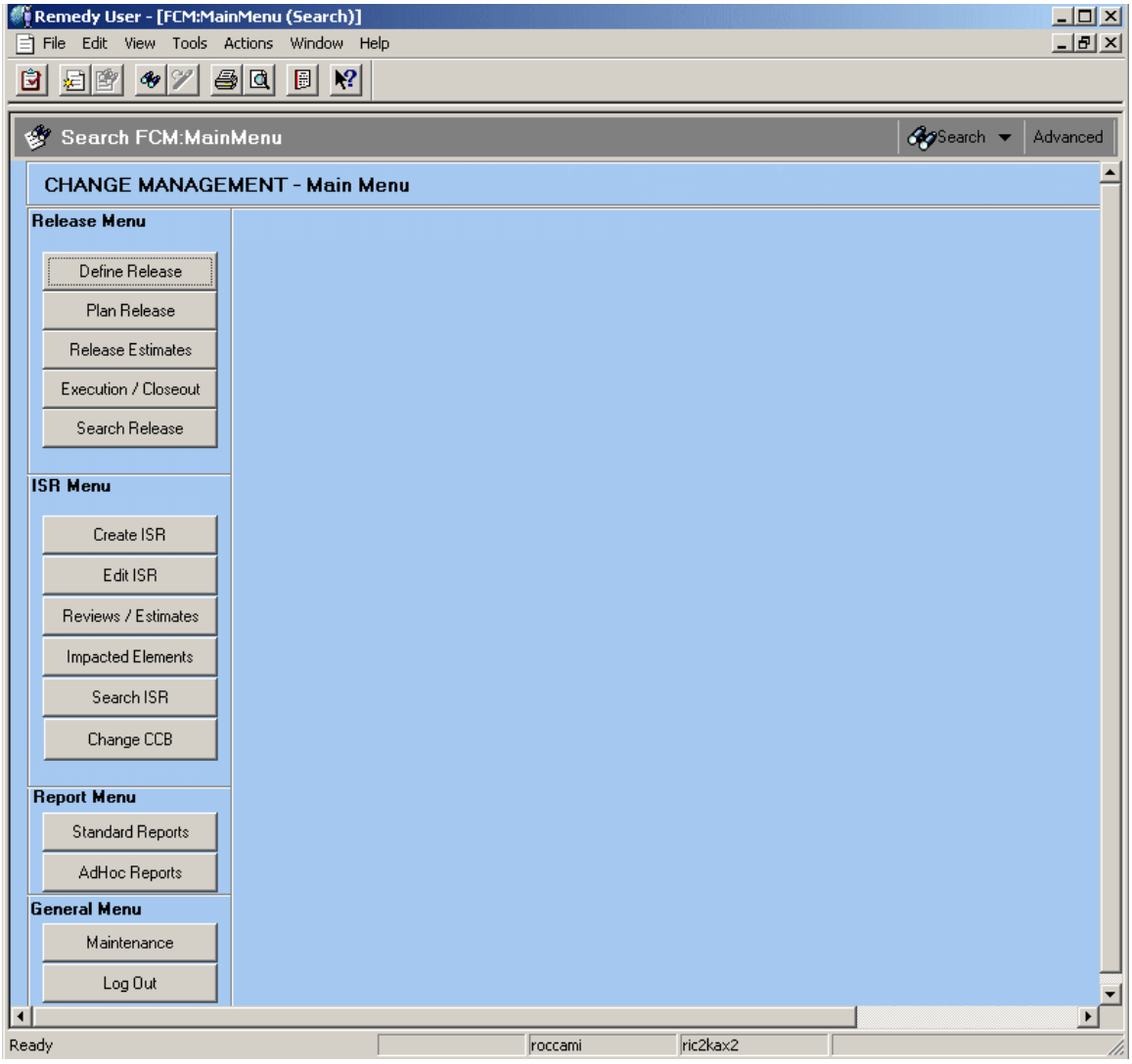
MAIN MENU



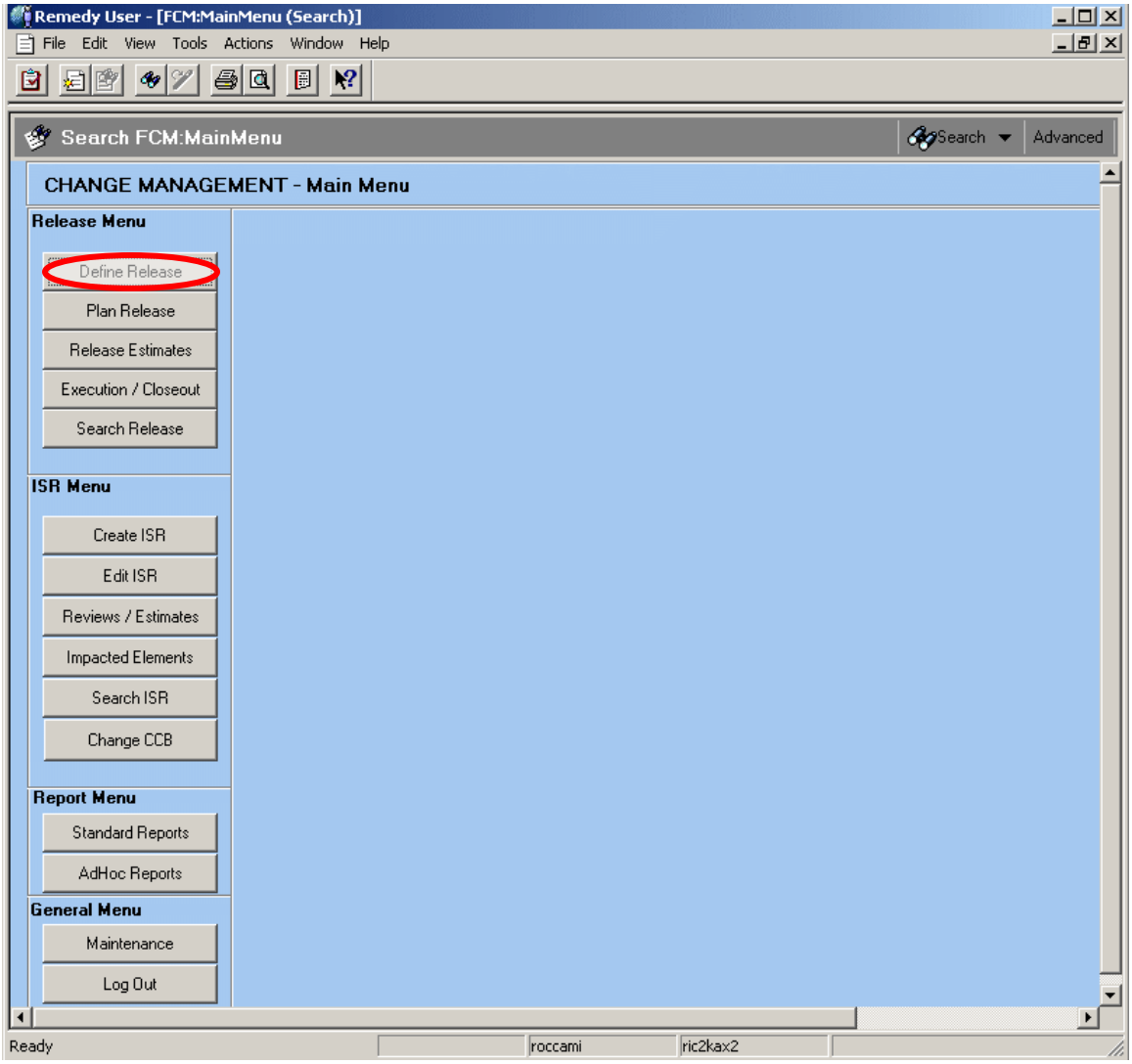
'Main Menu' screen (shown above) contains the following options:

- Release Menu – Options to operate on 'Release' related information are
  - Define Release;
  - Plan Release;
  - Release Estimates;
  - Execution / Close Out;
  - Search Release
- ISR Menu – Options to operate on 'ISR' related information are
  - Create ISR;
  - Edit ISR;

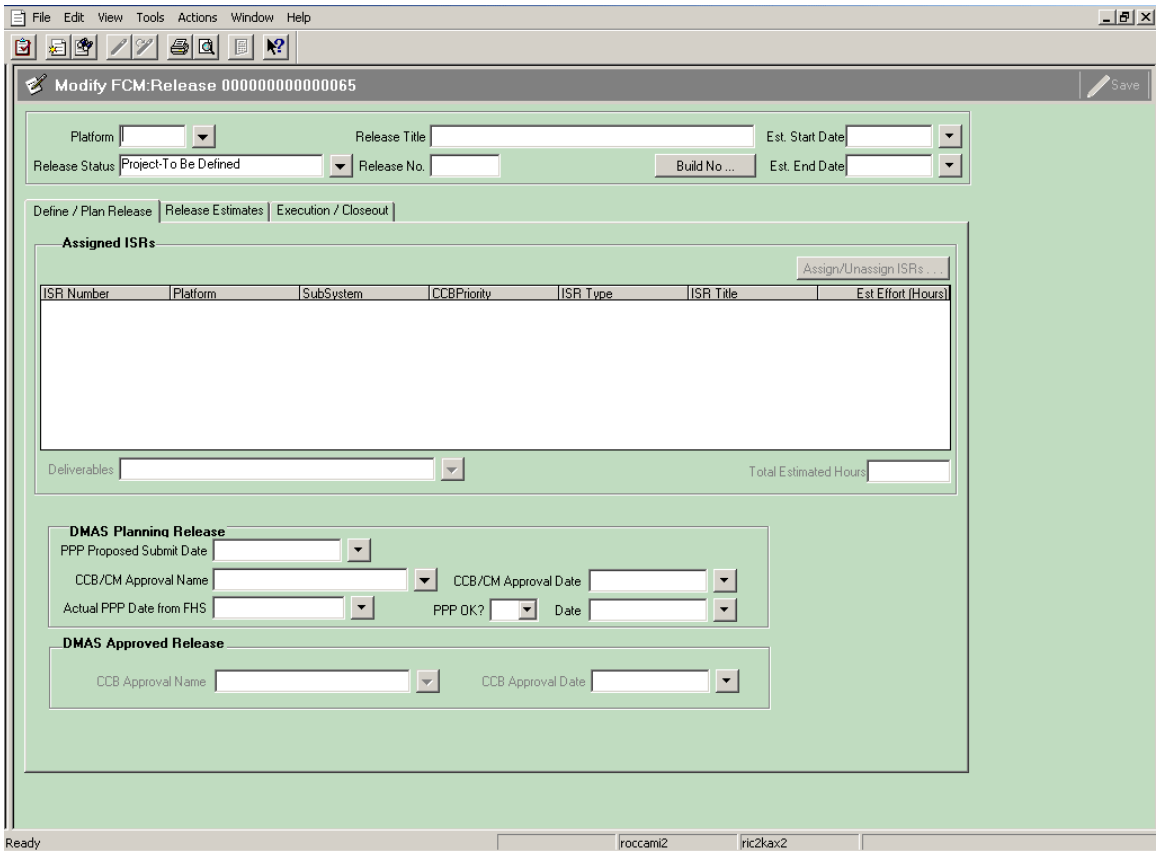
- Reviews / Estimates;
- Impacted Elements;
- Search ISR;
- Change CCB.

- Report Menu – Options to perform the reporting function are
  - Standard Reports;
  - Adhoc Reports.
- General Menu – Options to access are
  - Maintenance;
  - Log Out.

Release Menu – 'Define Release'



- 'Define Release' is used by DMAS to plan future releases. This is accessible to the DMAS CM Coordinator only.
- When 'Define Release' control under 'Release Menu' is clicked, then the screen (Define/Plan Release Page) shown below is displayed.



- 'Release Status' can have the following values:

  - **Project-To Be Defined**: Initial setting when Release is defined.

  - **Project-Assignment**: Set to this value when one or more ISRs are assigned to Release. Reset to 'Project-To Be Defined' when no ISRs remain as a result of all the ISRs being unassigned.

    Note: When ISR is assigned to a Release, value in 'Release No.' field is also used to automatically populate the 'Release No.' field for ISR. Additionally, 'ISR Status' field for ISR is automatically set to 'Approved-Assigned to Baseline/Project' (refer to 'All ISR Types except ADH' section within 'ISR Menu' option for more details).

  - **Project-Submit-Approved**: Set when 'CCB/CM Approval Name' field is entered and indicates submission of the project to FHS for the Project Planning Package (PPP).

  - **Project-Decision**: Set when 'Actual PPP Date from FHS' field is entered and indicates the start of PPP review by DMAS.

  - **Project-Approved**: Set when 'CCB Approval Name' field is entered and indicates the approval by DMAS to have the project executed.

Note: All ISRs associated to Release also have the 'ISR Status' field automatically set to 'Approved'(refer to 'All ISR Types except ADH' section within 'ISR Menu' option for more details)..

- **Project-In-Progress**: Automatically set when any ISR associated to the Release has FHS 'Date Started' field entered (refer to 'All ISR Types except ADH' section within 'ISR Menu – Execution/Close Out ' option for more details). This indicates the start of work on the Project/Release by FHS.

- **Project-Complete/Awaiting Billing**: Set when 'Build No' information is entered and indicates the completion of Project/Release by FHS.

- **Project-Complete/Closed**: Set when 'Project Close Date' field is entered and indicates the verification/acceptance of all deliverables as well as payment having been made for the Project/Release related invoice(s).

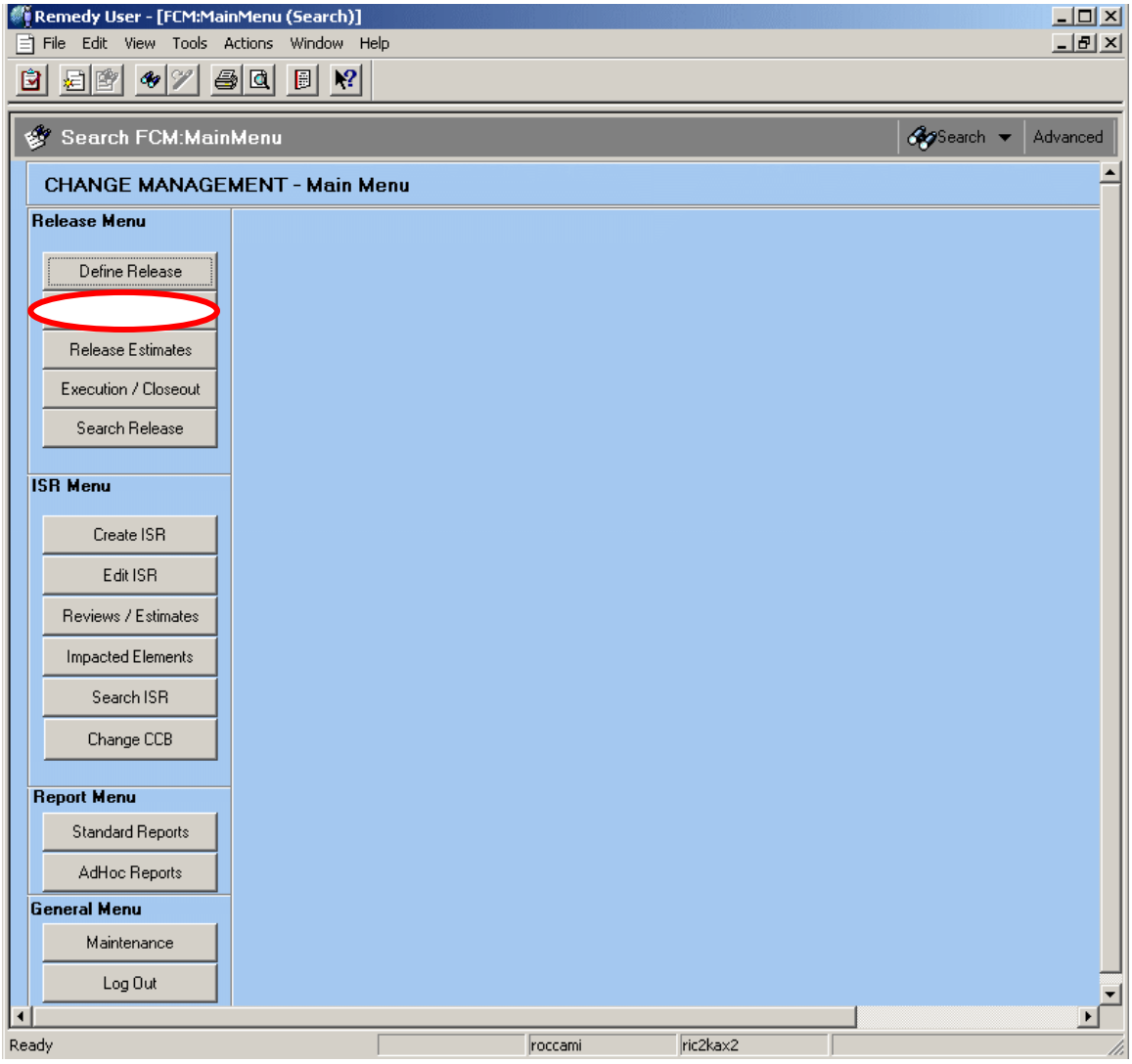
- Information on the fields related to the 'Define Release' function is shown in the table below.

Note: to have the 'Platform' and 'Release Title' fields must be entered and saved before order for the fields on the 'Define/Plan Release' tab are enabled.

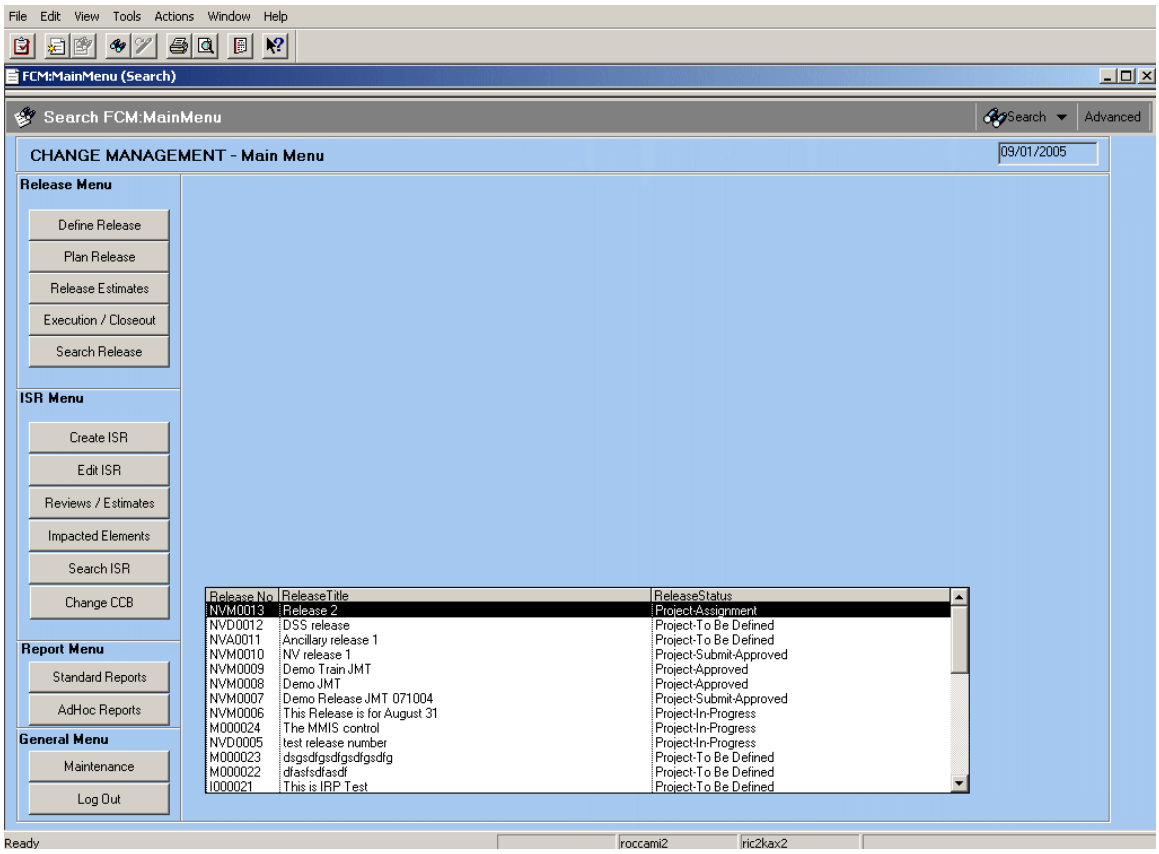
#	Tab Name	Group Name	Field Name	Instructions/Comments
1	-	-	Platform	The Platform field is a selection field. Select value from drop-down list: MMIS, IRP or Other.
2	-	-	Release Title	Any letters, numbers, symbols or keywords can be accepted. The Release Title field is 69 characters.
3	-	-	Est. Start Date	Select a date from the calendar editor or type a value to modify this field. Est. Start Date is a TimeStamp field. MM/DD/CCYY Edit Check: Greater than Current Date.
4	-	-	Est. End Date	Select a date from the calendar editor or type a value to modify this field. Est. End Date is a TimeStamp field. MM/DD/CCYY Edit Check: Greater than Current Date.
5	-	-	Release Status	System generated according to the progress of the Release on the

#	Tab Name	Group Name	Field Name	Instructions/Comments
				defined Release process. Details of settings for 'Release Status' can be found above the screen display.
6	-	-	Release No.	System generated
7	-	-	Release Status Setting	This field is viewable to the DMAS CM Coordinator only. It allows the DMAS CM Coordinator to override the system generated 'Release Status' by selecting the setting of 'Manually'. Default setting is 'System'. *Note: Switch from 'System' to 'Manually' option is a one-time event and cannot be reset.*

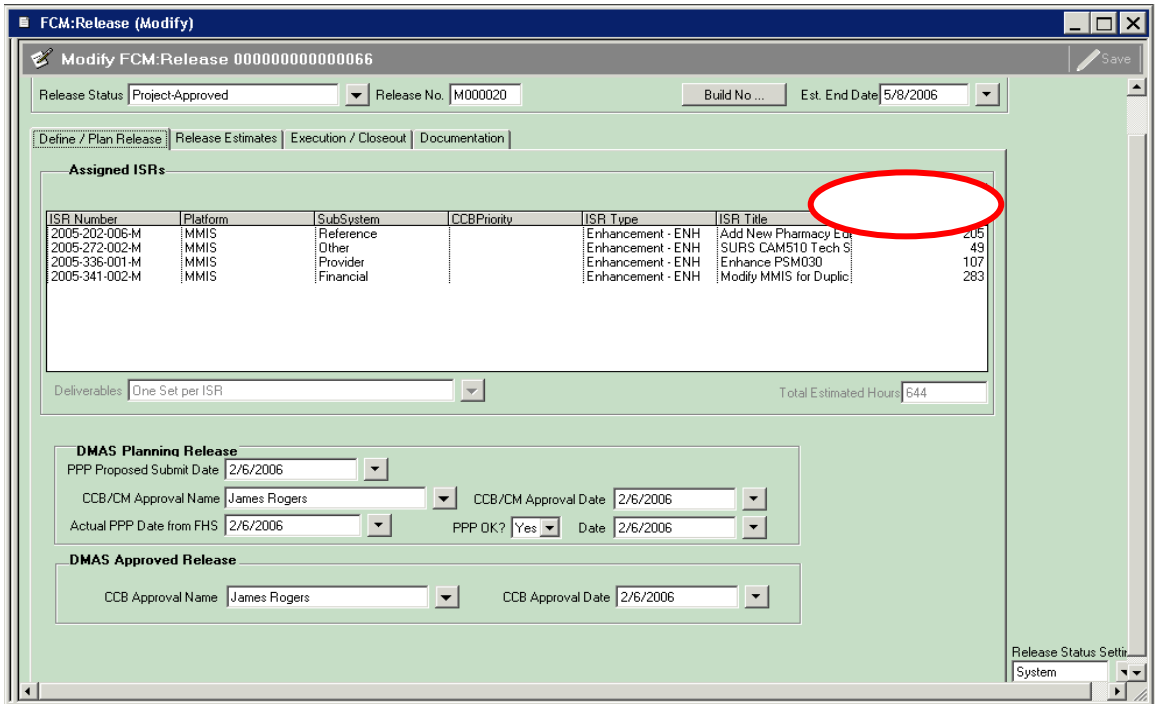
Release Menu – 'Plan Release'



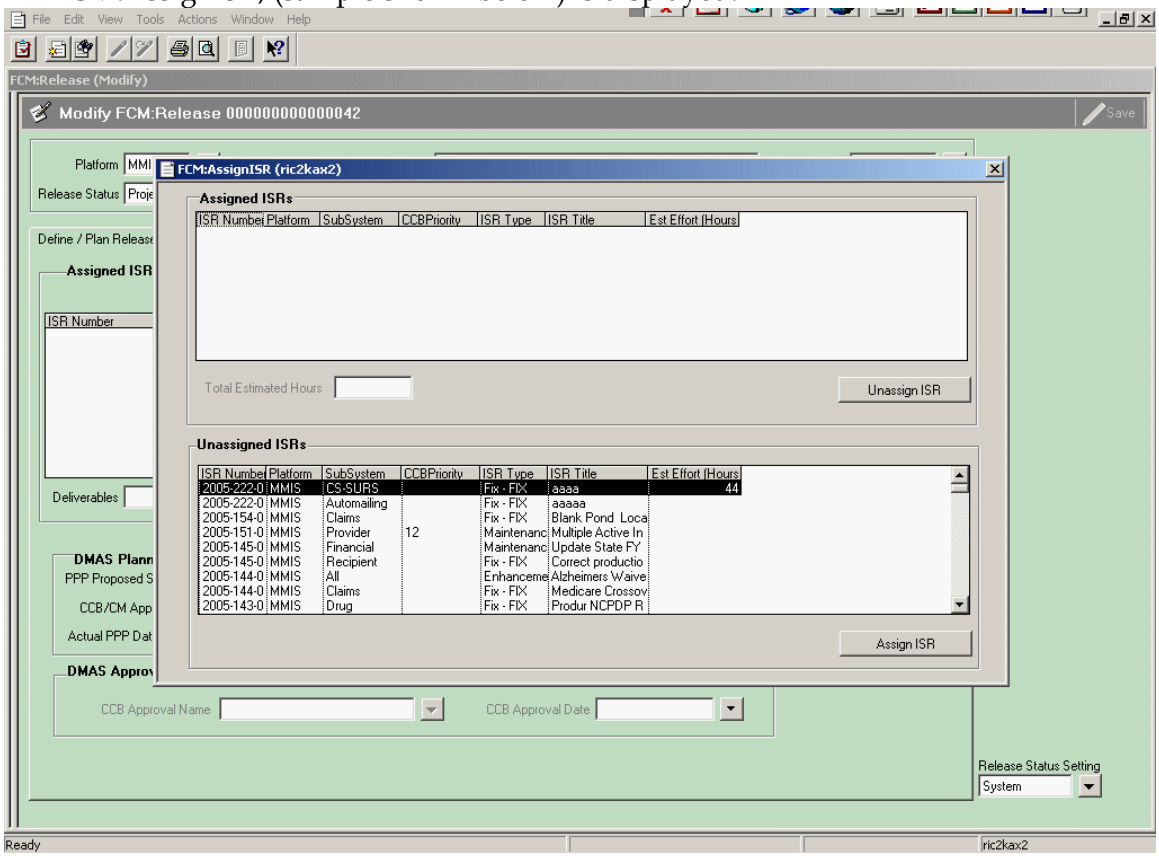
- 'Plan Release' is a shortcut to the position at the 'Define/Plan Release' tab which contains information related to planning of a Release. The DMAS CM Coordinator can only access and update this screen.
- DMAS CM Coordinator can plan a Release only if ISRs are available for the particular platform. These ISRs must have an approved Impact Assessment and approval from the DMAS CCB.
- 'Plan Release' function is done in stages:
  - Assign/Unassign ISRs for a Planned Release;
  - Obtain Project Planning Package (PPP) from FHS for Planned Release;
  - Finalize/Approve Release.
- When the 'Plan Release' option under 'Release Menu' is clicked, the screen shown below (sample) is displayed.



- List of available Releases are displayed. When a 'Release No.' is double-clicked, Modify FCM:Release Screen (sample shown below) is displayed.

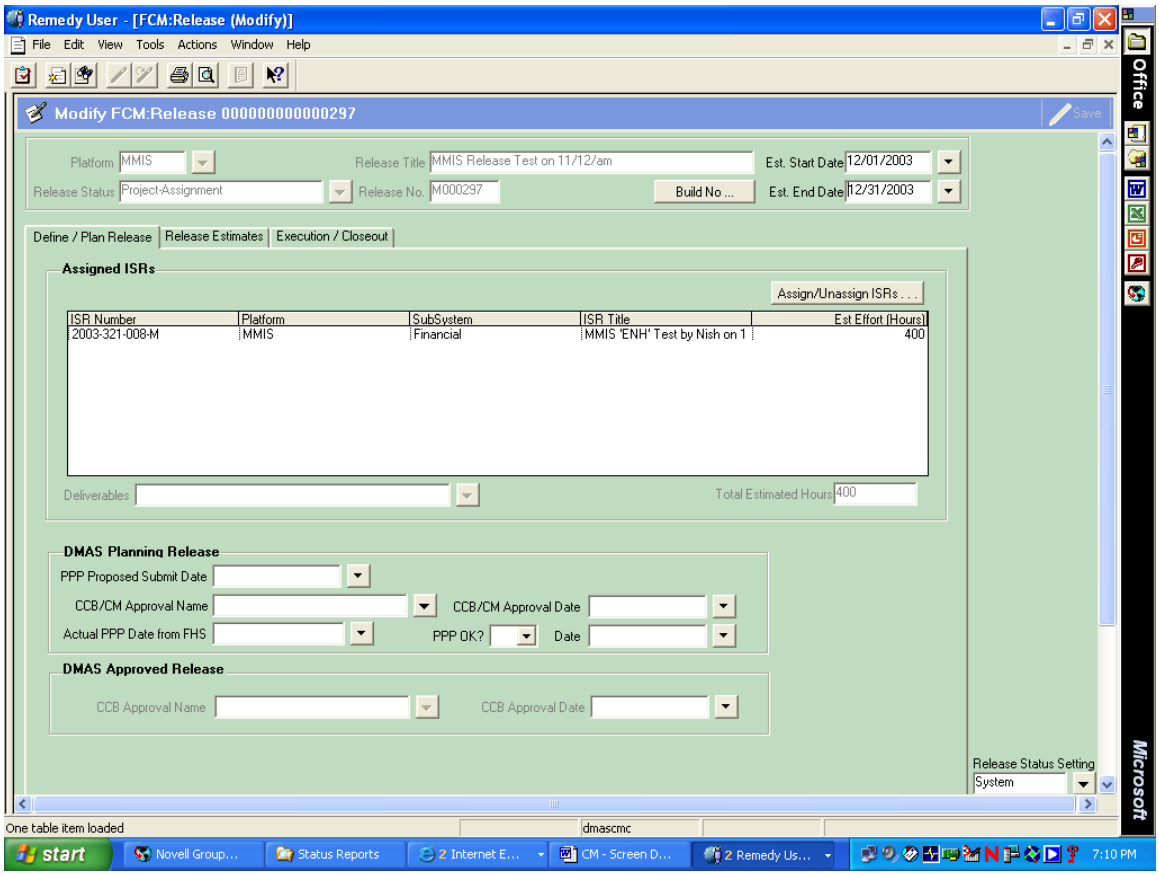


- When the 'Assign/Unassign ISRs' Control button is clicked, popup screen, FCM:AssignISR, (sample shown below) is displayed.



- ISRs available for assignment to the Release are shown under 'Unassigned ISRs'. ISRs are considered unassigned if it meets the following criteria:
  - No 'Release No.' associated to ISR;
  - ISR has the same platform as the Release;
  - ISR Status = 'Approved-CCB-Pending Baseline Assignment'.

- When an ISR is selected from the 'Unassigned ISRs' list and 'Assign ISR' is clicked, then ISR is moved to 'Assigned ISRs' and removed from 'Unassigned ISRs'. Total amount of estimated effort assigned to the Release is shown in 'Total Estimated Hours' (system generated). 'Release No.' and 'ISR Status' fields at the ISR level are also updated for the assigned ISR.
- For any ISR to be unassigned from a Release, select required ISR shown under 'Assigned ISRs' and click 'Unassign ISR'. ISR is moved to 'Unassigned ISRs' and removed from 'Assigned ISRs'. Total estimated effort for the Release is automatically adjusted to reflect the unassignment. 'Release No.' and 'ISR Status' fields at the ISR level are accordingly updated for the unassigned ISR.
- Exit from the screen on completing the assign/unassign exercise. Control returns to the screen shown (sample) below.



- Next stage of the 'Plan Release' function relates to the Project Planning Package (PPP).
- Information on the fields related to the next stage is shown in the table below.

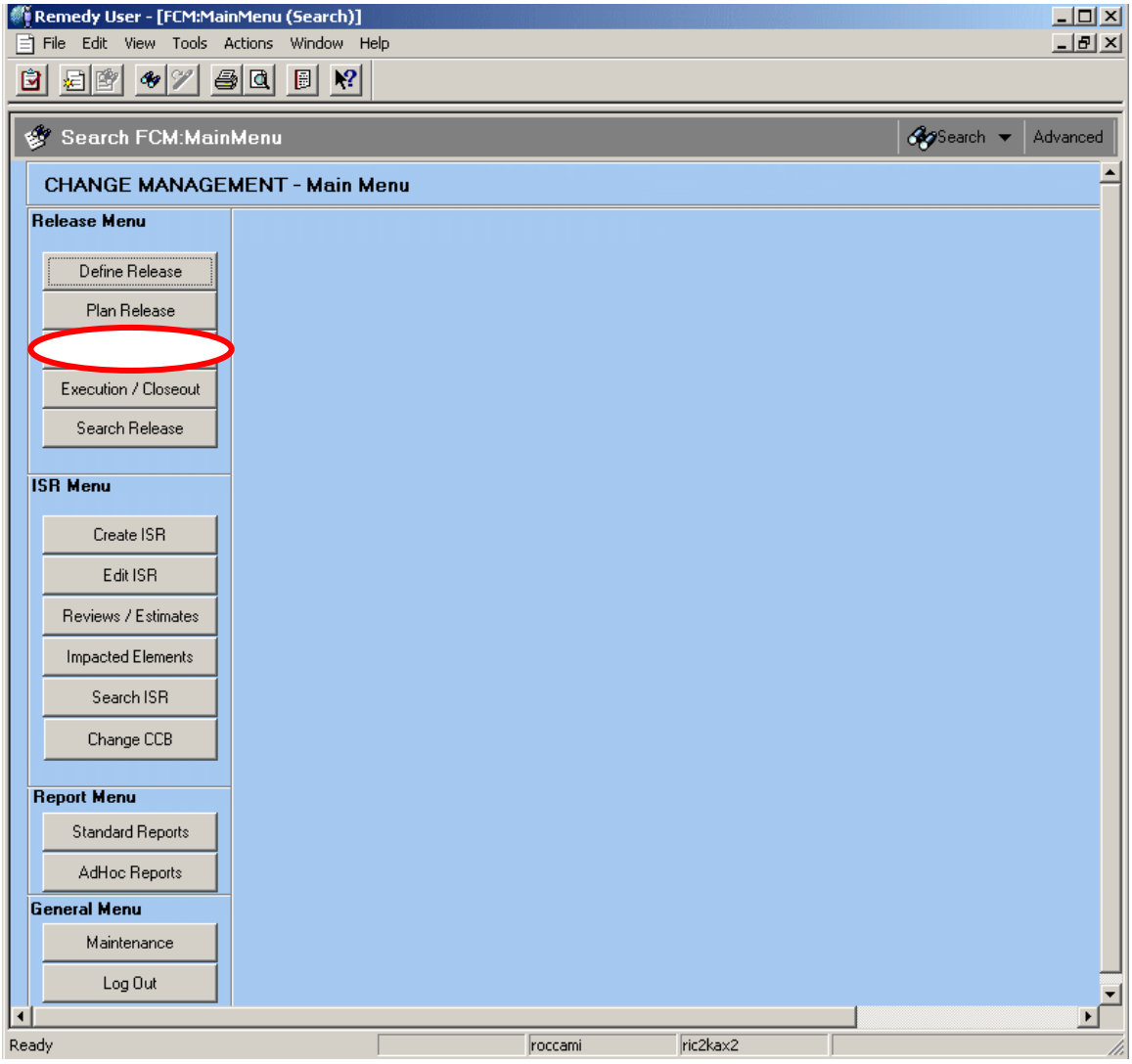
#	Tab Name	Group Name	Field Name	Instructions/Comments
1	Define/Plan Release	DMAS Planning Release	PPP Proposed Submit date	Select a date from the calendar editor or type a value to modify this field. This PPP Proposed Submit date is a TimeStamp field. MM/DD/CCYY Edit Check: Greater than Current Date.
2	Define/Plan Release	DMAS Planning Release	CCB/CM Approval Name	Type letters, numbers, symbols or keywords or choose an option from the FCM:MNU:Personnel:CCB/CM menu to modify this field. CCBCM:VA CCB/CM Approval Name is a character field and can contain up to 50 characters.
3	Define/Plan Release	DMAS Planning Release	CCB/CM Approval Date	Select a date from the calendar editor or type a value to modify this field. This CCB/CM Approval Date is a TimeStamp field. MM/DD/CCYY Edit Check: Equal/Less than Current Date.
4	Define/Plan Release	DMAS Planning Release	Actual PPP Date from FHS	Select a date from the calendar editor or type a value to modify this field Actual PPP Date from FHS is a TimeStamp field. MM/DD/CCYY Edit Check: Equal/Less than Current Date.
5	Define/Plan Release	DMAS Planning Release	PPP OK?	PPP OK? is a selection field. Selections are 'Yes', 'No' or ('Clear'). *Note: Enter 'Estimates' info if PPP is accepted. Refer to 'Release Menu – Release Estimates' if field ' Deliverables' is set to 'One set of deliverables for Release' OR 'ISR Menu – Reviews/Estimates' if field Deliverables is set to 'Separate deliverables for ISR'.*
6	Define/Plan Release	DMAS Planning Release	Date	Select a date from the calendar editor or type a value to modify this field. Date is a TimeStamp field.

#	Tab Name	Group Name	Field Name	Instructions/Comments
				MM/DD/CCYY Edit Check: Equal/Less than Current Date.
7	Define/Plan Release	Assigned ISRs	Deliverables	Field is enabled when 'PPP OK?' is set to 'Yes'. Select the appropriate setting based on information obtained from PPP. Setting can be 'Separate deliverables for each ISR' or 'One set of deliverables for Release'. Deliverables is a character field and can contain up to 69 characters.
8	Define/Plan Release	DMAS Approved Release	CCB Approval Name	Type letters, numbers, symbols or keywords or choose an option from the FCM:MNU:Personnel:CCB/CM menu to modify this field. CCBCM:VA CCB Approval Name is a character field and can contain up to 50 characters. Note: This field is enabled when 'Deliverables' is filled.
9	Define/Plan Release	DMAS Approved Release	CCB Approval Date	Select a date from the calendar editor or type a value to modify this field. CCB Approval Date is a TimeStamp field. MM/DD/CCYY Edit Check: Equal/Less than Current Date. Note: This field is enabled when 'Deliverables' is filled.

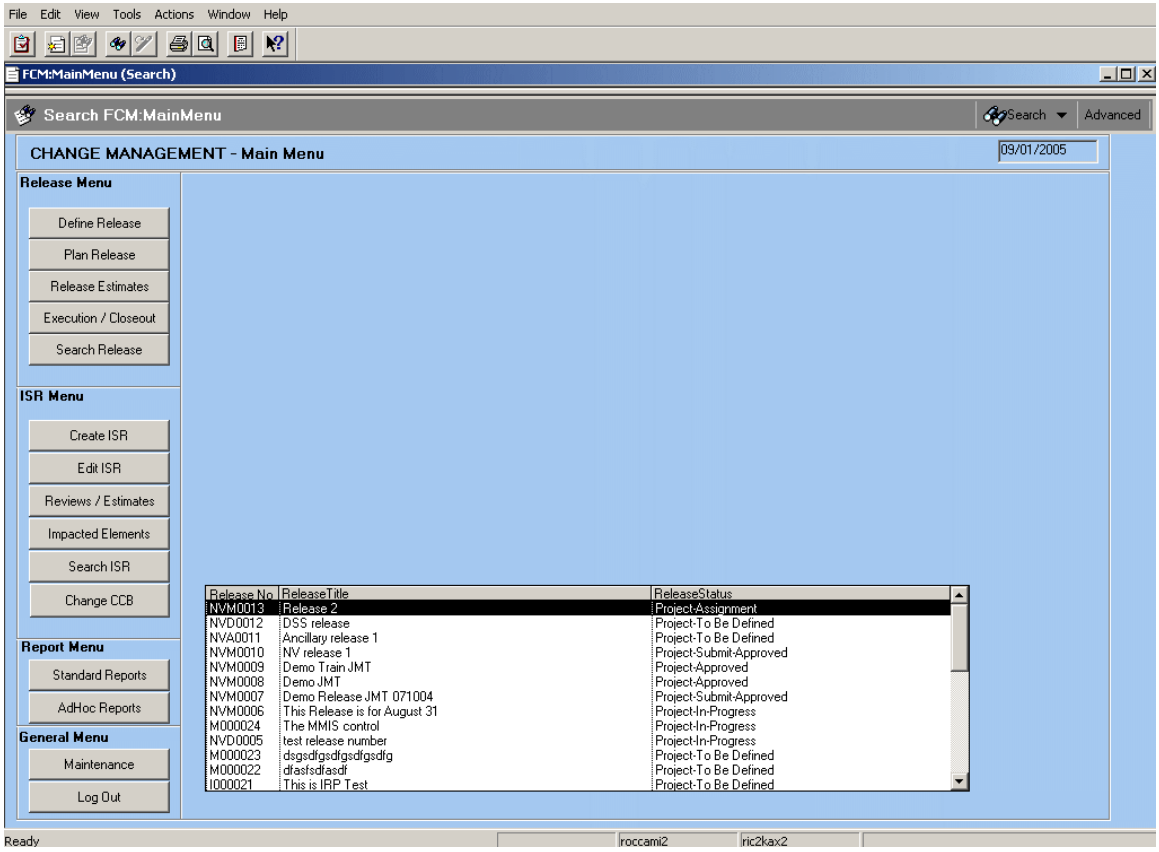
- **IMPORTANT NOTES**
  - Setting of 'Deliverables' is crucial as it indicates whether all the ISRs making up the Release have separate deliverables or one set of deliverables. Release CANNOT be made up of ISRs where some ISRs have separate deliverables and others are required to have one set of deliverables. If such a situation arises, the ISRs have to be put into another Release.
  - When 'Deliverables' is set to 'One Set for Release', the ***ISR fields*** grouped under 'Estimates' and 'Actuals' on the 'Reviews/Estimates' and 'Execution/Close Out' tabs are ***disabled*** for data entry. In this scenario, the system will push the relevant data from the Release to the ISR level when the 'Refresh Data for ISR' button (on 'Execution / Closeout' tab) is clicked – can be done at any time. Information at the ISR level is replaced each time it is clicked.

- When 'Deliverables' is set to 'One Set per ISR', the ***Release fields*** grouped under 'Estimates' and 'Actuals' on the 'Release Estimates' and 'Release Execution/Close Out' tabs are ***disabled*** for data entry. In this scenario, the system will rollup the relevant data from the ISR to the Release level when the 'Refresh Data for Release' button (on 'Release Estimates' or 'Execution / Closeout' tab) is clicked – can be done at any time. Information at the Release level is replaced each time it is clicked.
- The group name 'Estimates' have to be keyed in when the information is available while the group name 'Actuals' for hours only will be system loaded using an interface file provided by Project Invision / MS Project portion of the system.

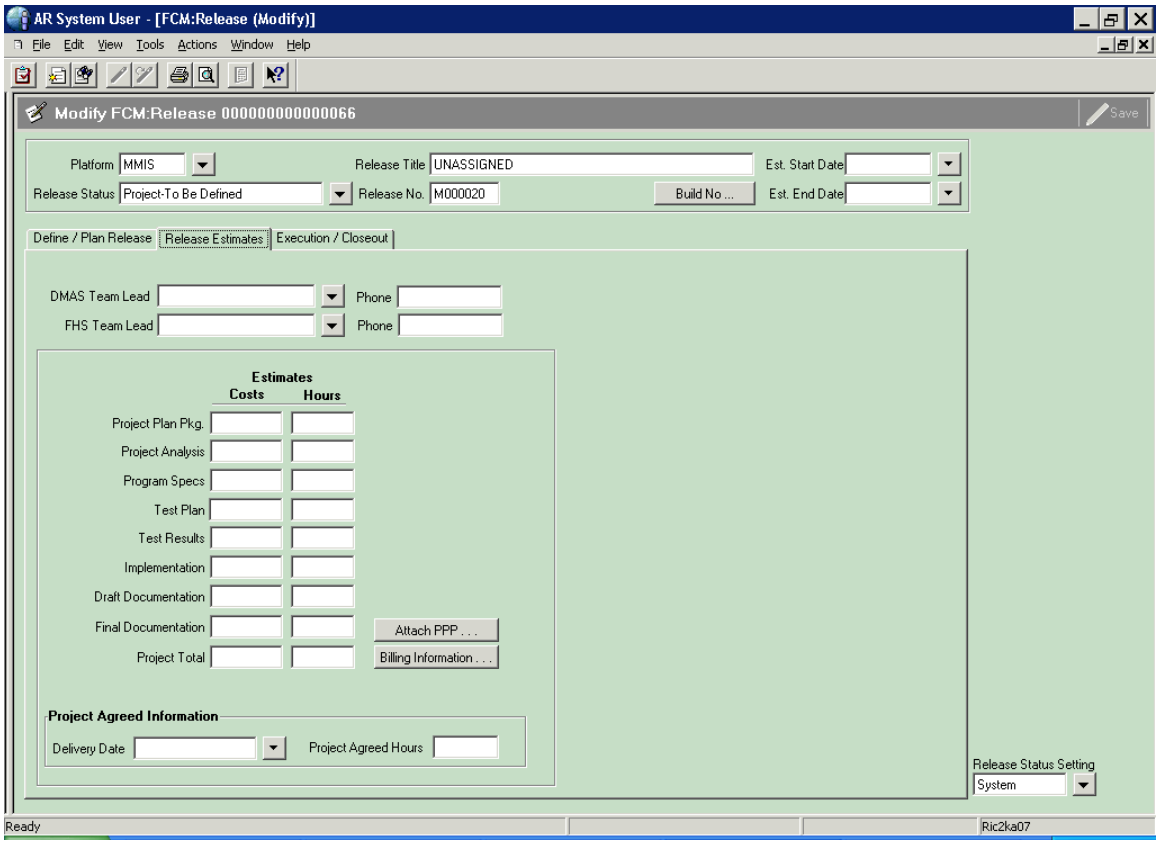
Release Menu – 'Release Estimates'



- 'Release Estimates' is a shortcut to the position at the 'Release Estimates' tab which contains information obtained from the Project Planning Package (PPP) for a Planned Release. This is accessible and can be updated by the DMAS CM Coordinator only.
- DMAS CM Coordinator enters the 'Release Estimates' information after PPP is received from FHS and accepted by DMAS.
- Click on 'Release Estimates' option under 'Release Menu' and the screen shown below (sample) is displayed.



- List of available Releases are shown. Double-click on the 'Release No.' of interest to access the information for the Release. Sample screen shown below is displayed.



- Information on the fields related to this screen is shown in the table below.
  Note: 'Estimates' for Costs and Hours have to be keyed in when the information is available.

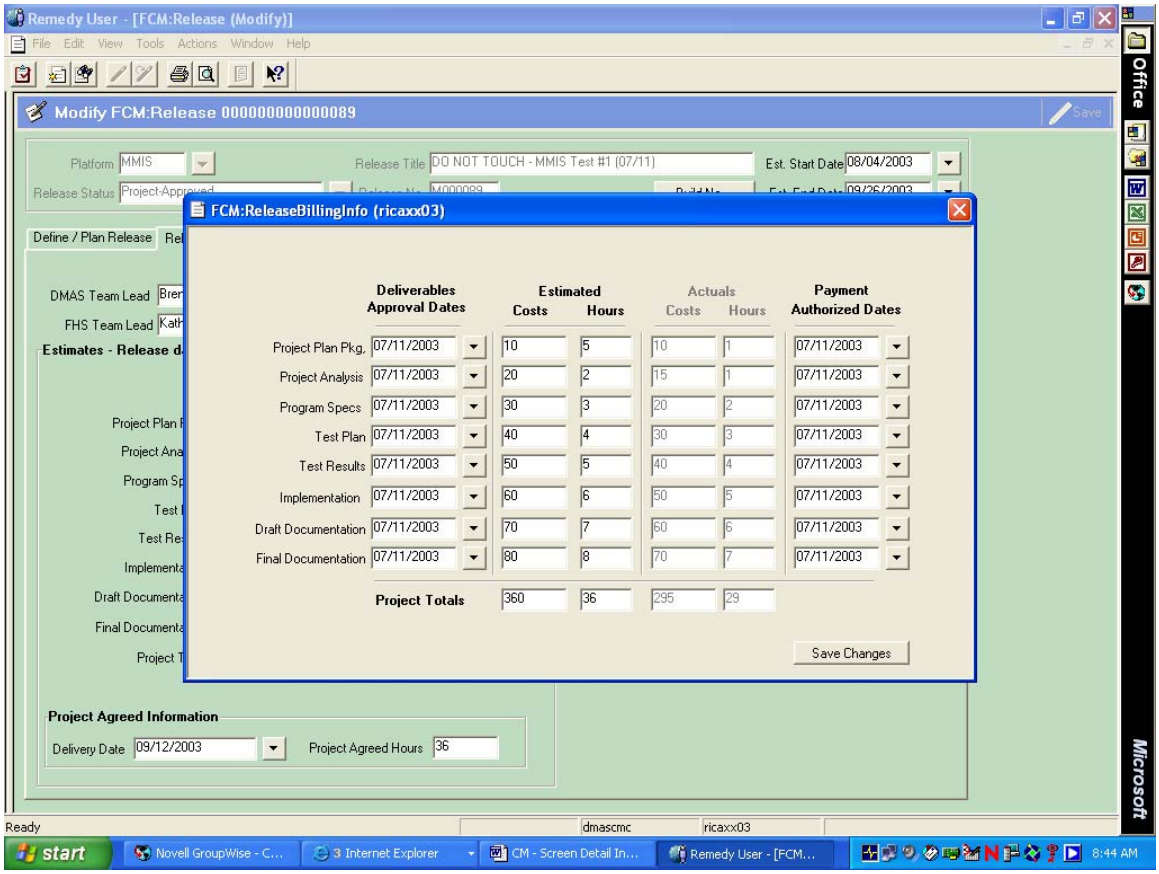
#	Tab Name	Group Name	Field Name	Instructions/Comments
1	Release Estimates	-	DMAS Team Lead	Type letters, numbers, symbols or keywords or choose an option from the FCM:MNU:Personnel:DMASTeamLead menu to modify this field. This field is a character field and can contain up to 50 characters.
2	Release Estimates	-	Phone	Phone number can be accepted or pulled from the FCM:Personnel. The Phone field can contain 15 characters.
3	Release Estimates	-	FHS Team Lead	Type letters, numbers, symbols or keywords or choose an option from the FCM:MNU:Personnel:FHSTeamLead menu to modify this field. This field is a character field and can contain up to 69 characters.
4	Release	-	Phone	Phone number can be accepted or

#	Tab Name	Group Name	Field Name	Instructions/Comments
	Estimates			pulled from the FCM:Personnel. The Phone field can contain 15 characters.
5	Release Estimates	Estimates	Project Plan Pkg. – Costs	A number can be accepted between 0 and 2,147,483,647 to modify the field. Project Plan Pkg. is an Integer field.
6	Release Estimates	Estimates	Project Plan Pkg. - Hours	A number can be accepted between 0 and 2,147,483,647 to modify the field. PrjtPlanPkgEstHours (536871079) is an Integer field.
7	Release Estimates	Estimates	Project Analysis – Costs	A number can be accepted between 0 and 2,147,483,647 to modify the field. Project Analysis is an Integer field.
8	Release Estimates	Estimates	Project Analysis – Hours	A number can be accepted between 0 and 2,147,483,647 to modify the field. ProjectAnalysisEstHours (536871081) is an Integer field.
9	Release Estimates	Estimates	Program Specs - Costs	A number can be accepted between 0 and 2,147,483,647 to modify the field. Program Specs is an Integer field.
10	Release Estimates	Estimates	Program Specs - Hours	A number can be accepted between 0 and 2,147,483,647 to modify the field. ProgramSpecsEstHours (536871083) is an Integer field.
11	Release Estimates	Estimates	Test Plan - Costs	A number can be accepted between 0 and 2,147,483,647 to modify the field. Test Plan is an Integer field.
12	Release Estimates	Estimates	Test Plan – Hours	A number can be accepted between 0 and 2,147,483,647 to modify the field. TestPlanEstHours (536871090) is an Integer field.
13	Release Estimates	Estimates	Test Results - Costs	A number can be accepted between 0 and 2,147,483,647 to modify the field. Test Results is an Integer field.
14	Release Estimates	Estimates	Test Results – Hours	A number can be accepted between 0 and 2,147,483,647 to modify the field. TestResultsEstHours (536871091) is an Integer field.
15	Release Estimates	Estimates	Implementation – Costs	A number can be accepted between 0 and 2,147,483,647 to modify the field. Implementation is an Integer field.
16	Release Estimates	Estimates	Implementation – Hours	A number can be accepted between 0 and 2,147,483,647 to modify the field. ImplementationEstHours (536871092) is an Integer field.
17	Release Estimates	Estimates	Draft Documentation – Costs	A number can be accepted between 0 and 2,147,483,647 to modify the field. Draft Documentation is an Integer

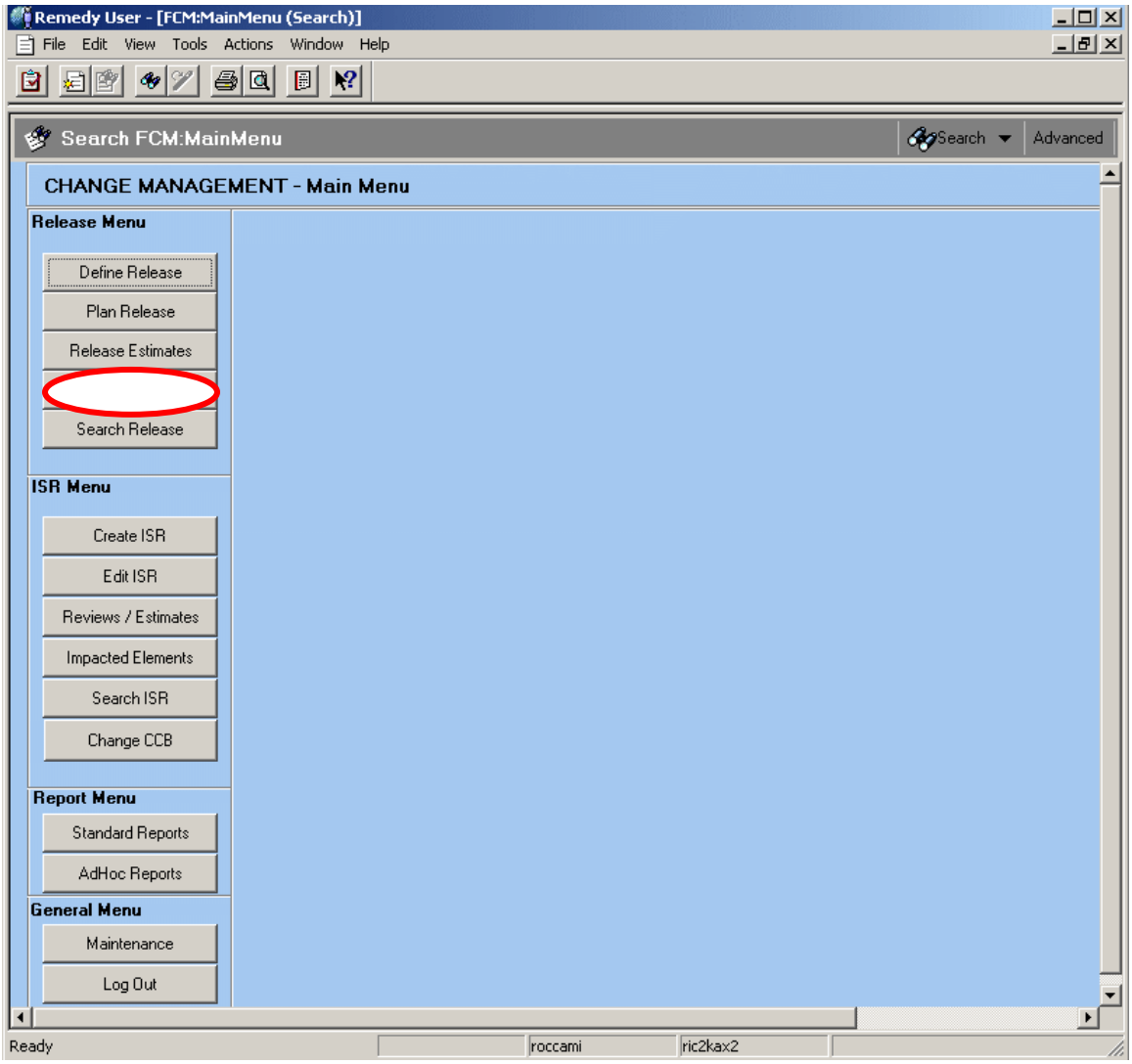
#	Tab Name	Group Name	Field Name	Instructions/Comments
				field.
18	Release Estimates	Estimates	Draft Documentation – Hours	A number can be accepted between 0 and 2,147,483,647 to modify the field. Draft DocumentationEstHours (536871093) is an Integer field.
19	Release Estimates	Estimates	Final Documentation – Costs	A number can be accepted between 0 and 2,147,483,647 to modify the field. Final Documentation is an Integer field.
20	Release Estimates	Estimates	Final Documentation – Hours	A number can be accepted between 0 and 2,147,483,647 to modify the field. FinalDocumentationEstHours (536871094) is an Integer field.
21	Release Estimates	Estimates	Project Total - Costs	A number can be accepted between 0 and 2,147,483,647 to modify the field. Project Total is an Integer field.
22	Release Estimates	Estimates	Project Total - Hours	A number can be accepted between 0 and 2,147,483,647 to modify the field. ProjectTotalEstHours (536871095) is an Integer field.
23	Release Estimates	Project Agreed Information	Delivery Date	Select a date from the calendar editor or type a value to modify this field. Delivery Date is a TimeStamp field. MM/DD/CCYY Edit Check: Greater than Current Date.
24	Release Estimates	Project Agreed Information	Project Agreed Hours	Any number, letter, symbol or keyword can be accepted. Project Agreed Hours can contain 15 characters.

- Information on other fields related to this screen is as follows:

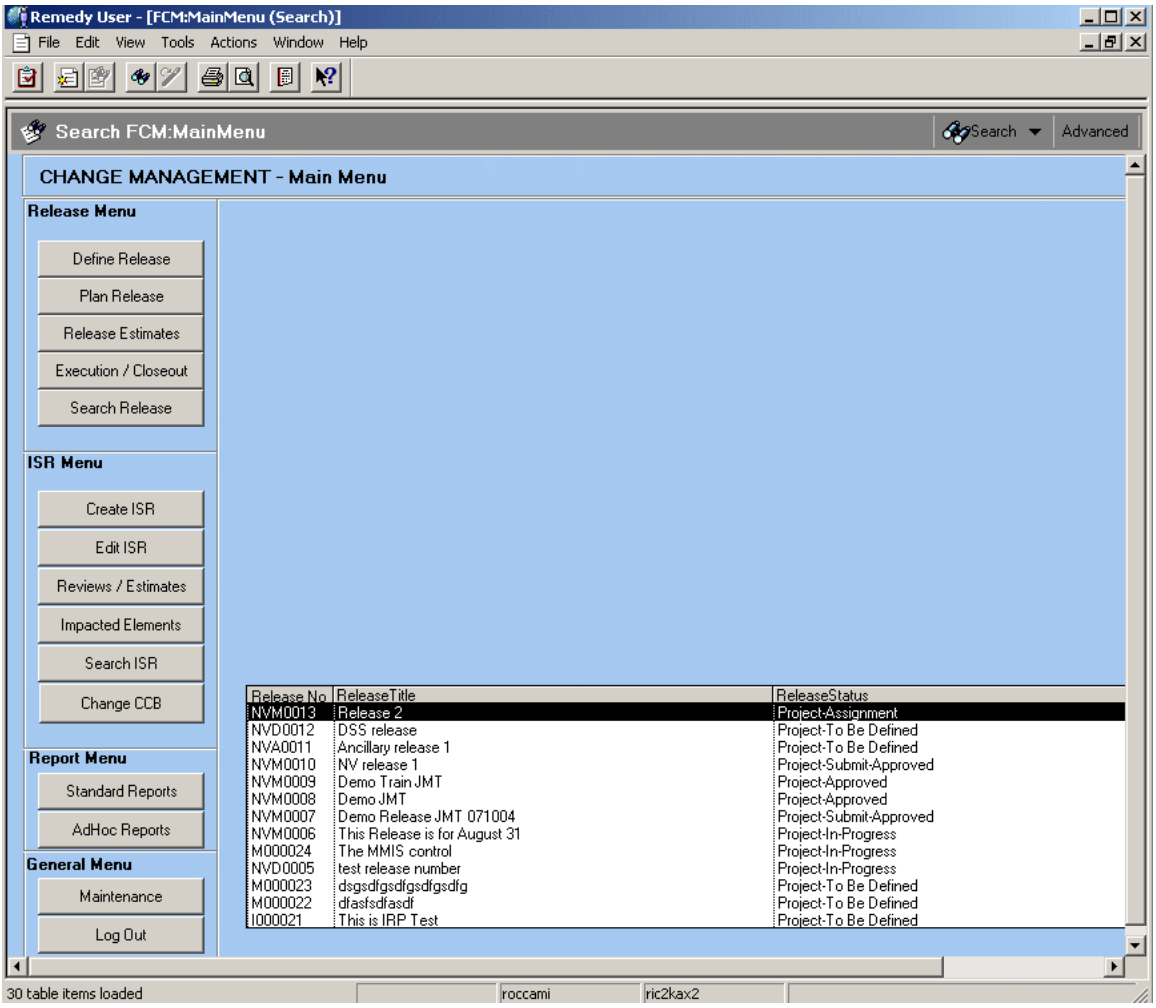
#	Tab Name	Group Name	Field Name	Instructions/Comments
1	Release Estimates	-	Billing Information …	Screen shown below is displayed when 'Billing Information …' is clicked. This provides a facility to have the estimates and actuals side by side. Information can be accepted on it. The information will be captured and shown on 'Release Estimates' and 'Release Execution/ Close Out' tabs.



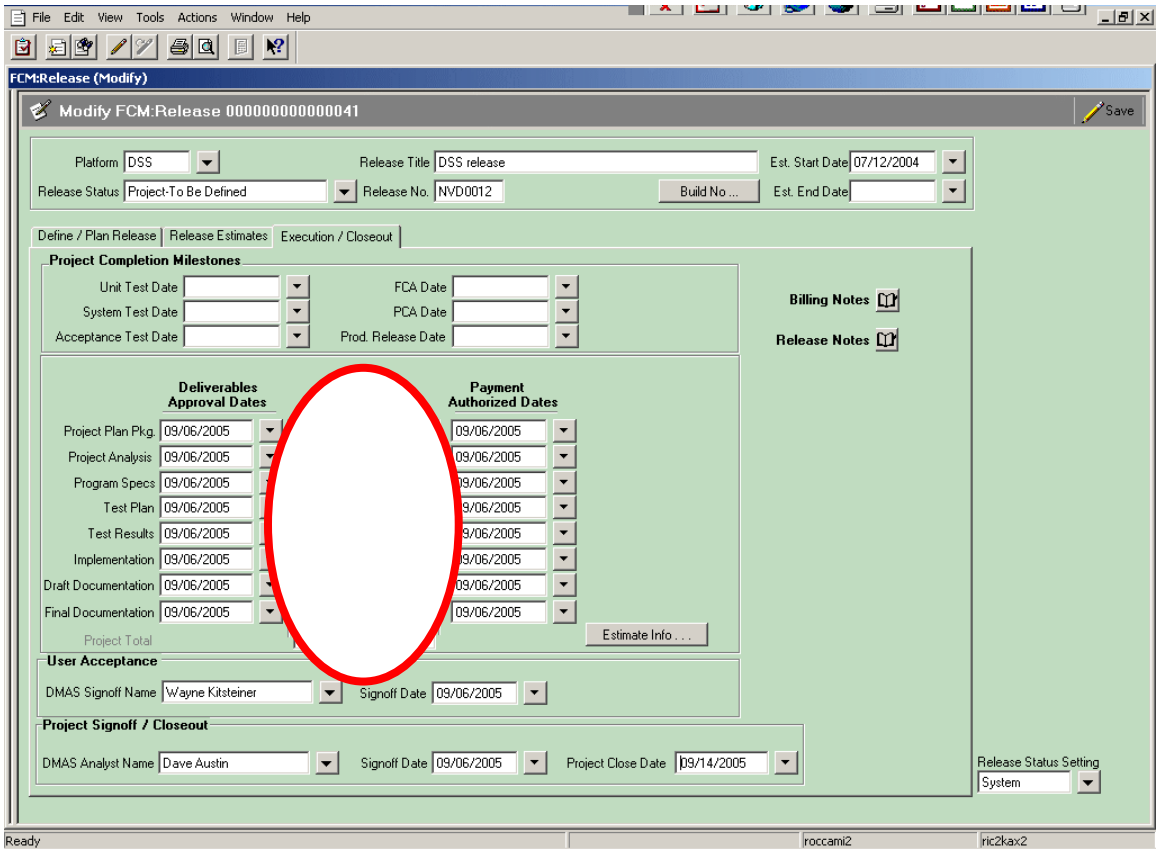
Release Menu – 'Execution / Close Out'



- 'Execution / Close Out' is a shortcut to the position at the 'Execution / Close Out' tab which contains information on the Execution and Close Out stages of the work done for an Approved Release/Project. This is accessible by the DMAS CM Coordinator only.
- DMAS CM Coordinator enters the 'Release Execution / Close Out' information as the work progresses for the Approved Release/Project.
- Click on 'Execution / Close Out' option under 'Release Menu' and the screen shown below is displayed.



- List of available Releases are shown. Double-click on the 'Release No.' of interest to access the information for the Release. Sample screen shown below is displayed.



- Information on the fields related to this screen is shown in the table below.
  Note: 'Actuals' for Hours will be system loaded using an interface file provided by Project Invision / MS Project portion of the system.

#	Tab Name	Group Name	Field Name	Instructions/Comments
1	Execution / Close Out	Project Completion Milestones	Unit Test Date	A date can be accepted from the calendar editor or type a value to modify this field. Unit Test Date is a TimeStamp field. MM/DD/CCYY Edit Check: Equal/Less than Current Date.
2	Execution / Close Out	Project Completion Milestones	System Test Date	A date can be accepted from the calendar editor or type a value to modify this field. System Test Date is a TimeStamp field. MM/DD/CCYY. Edit Check: Equal/Less than Current Date.
3	Execution /	Project	Acceptance	A date can be accepted from the

#	Tab Name	Group Name	Field Name	Instructions/Comments
	Close Out	Completion Milestones	Test Date	calendar editor or type a value to modify this field. Test Date is a TimeStamp field. MM/DD/CCYY Edit Check: Equal/Less than Current Date.
4	Execution / Close Out	Project Completion Milestones	FCA Date	A date can be accepted from the calendar editor or type a value to modify this field. FCA Date is a TimeStamp field. MM/DD/CCYY Edit Check: Equal/Less than Current Date.
5	Execution / Close Out	Project Completion Milestones	PCA Date	A date can be accepted from the calendar editor or type a value to modify this field. PCA Date is a TimeStamp field. MM/DD/CCYY Edit Check: Equal/Less than Current Date.
6	Execution / Close Out	Project Completion Milestones	Prod. Release Date	A date can be accepted from the calendar editor or type a value to modify this field. Prod. Release Date is a TimeStamp field. MM/DD/CCYY Edit Check: Equal/Less than Current Date.
7	Execution / Close Out	Actuals	Project Plan Pkg. – Deliverables Approval Date	A date can be accepted from the calendar editor or type a value to modify this field. Project Plan Pkg. is a TimeStamp field. MM/DD/CCYY Edit Check: Equal/Less than Current Date.
8	Execution / Close Out	Actuals	Project Plan Pkg. – Costs	A number 0 – 99999999.99 with two digits to the right of the decimal point can be accepted to modify this field. The PPPActCosts (536871096) is a decimal field.
9	Execution / Close Out	Actuals	Project Plan Pkg. - Hours	A number 0 – 99999999.99 with two digits to the right of the decimal point can be accepted to modify this field. The PPPActsHours (536871105) is a decimal field.

#	Tab Name	Group Name	Field Name	Instructions/Comments
10	Execution / Close Out	Actuals	Project Plan Pkg. – Payment Authorized Approval Date	A date can be accepted from the calendar editor or type a value to modify this field. PPPPaymentAuthDate (536870987) is a TimeStamp field. MM/DD/CCYY Edit Check: Equal/Less than Current Date.
11	Execution / Close Out	Actuals	Project Analysis – Deliverables Approval Date	A date can be accepted from the calendar editor or type a value to modify this field. Project Analysis is a TimeStamp field. MM/DD/CCYY Edit Check: Equal/Less than Current Date.
12	Execution / Close Out	Actuals	Project Analysis – Costs	A number 0 – 99999999.99 with two digits to the right of the decimal point can be accepted to modify this field. The ProjectAnalysisActCosts (536871097) is a decimal field.
13	Execution / Close Out	Actuals	Project Analysis – Hours	A number 0 – 99999999.99 with two digits to the right of the decimal point can be accepted to modify this field. The ProjectAnalysisActHours (536871106) is a decimal field.
14	Execution / Close Out	Actuals	Project Analysis – Payment Authorized Approval Date	A date can be accepted from the calendar editor or type a value to modify this field. ProjAnalysisPaymtAuthDate (536870985) is a TimeStamp field. MM/DD/CCYY Edit Check: Equal/Less than Current Date.
15	Execution / Close Out	Actuals	Program Specs – Deliverables Approval Date	A date can be accepted from the calendar editor or type a value to modify this field. Program Specs is a TimeStamp field. MM/DD/CCYY Edit Check: Equal/Less than Current Date.
16	Execution / Close Out	Actuals	Program Specs – Costs	A number 0 – 99999999.99 with two digits to the right of the decimal point can be accepted to modify this field. The ProgramSpecsActCosts (536871098) is a decimal field.

#	Tab Name	Group Name	Field Name	Instructions/Comments
17	Execution / Close Out	Actuals	Program Specs – Hours	A number 0 – 99999999.99 with two digits to the right of the decimal point can be accepted to modify this field. The ProgramSpecsActHours (536871107) is a decimal field.
18	Execution / Close Out	Actuals	Program Specs – Payment Authorized Approval Date	A date can be accepted from the calendar editor or type a value to modify this field. ProgramSpecsPayAuthDate (536870990) is a TimeStamp field. MM/DD/CCYY Edit Check: Equal/Less than Current Date.
19	Execution / Close Out	Actuals	Test Plan – Deliverables Approval Date	A date can be accepted from the calendar editor or type a value to modify this field. Test Plan is a TimeStamp field. MM/DD/CCYY Edit Check: Equal/Less than Current Date.
20	Execution / Close Out	Actuals	Test Plan – Costs	A number 0 – 99999999.99 with two digits to the right of the decimal point can be accepted to modify this field. The TestPlanActCosts (536871099) is a decimal field.
21	Execution / Close Out	Actuals	Test Plan – Hours	A number 0 – 99999999.99 with two digits to the right of the decimal point can be accepted to modify this field. The TestPlanActHours (536871108) is a decimal field.
22	Execution / Close Out	Actuals	Test Plan – Payment Authorized Approval Date	A date can be accepted from the calendar editor or type a value to modify this field. TestPlanPaymentAuthDate (536870988) is a TimeStamp field. MM/DD/CCYY Edit Check: Equal/Less than Current Date.
23	Execution / Close Out	Actuals	Test Results – Deliverables Approval Date	A date can be accepted from the calendar editor or type a value to modify this field. Test Results is a TimeStamp field. MM/DD/CCYY Edit Check: Equal/Less than Current Date.

#	Tab Name	Group Name	Field Name	Instructions/Comments
24	Execution / Close Out	Actuals	Test Results – Costs	A number 0 – 99999999.99 with two digits to the right of the decimal point can be accepted to modify this field. The TestResultsActCosts (536871100) is a decimal field.
25	Execution / Close Out	Actuals	Test Results – Hours	A number 0 – 99999999.99 with two digits to the right of the decimal point can be accepted to modify this field. The TestResultsActHours (536871109) is a decimal field.
26	Execution / Close Out	Actuals	Test Results – Payment Authorized Approval Date	A date can be accepted from the calendar editor or type a value to modify this field. TestResultsPayAuthDate (536870995) is a TimeStamp field. MM/DD/CCYY Edit Check: Equal/Less than Current Date.
27	Execution / Close Out	Actuals	Implementation – Deliverables Approval Date	A date can be accepted from the calendar editor or type a value to modify this field. Implementation is a TimeStamp field. MM/DD/CCYY Edit Check: Equal/Less than Current Date.
28	Execution / Close Out	Actuals	Implementation – Costs	A number 0 – 99999999.99 with two digits to the right of the decimal point can be accepted to modify this field. The ImplementationActCosts (536871101) is a decimal field.
29	Execution / Close Out	Actuals	Implementation – Hours	A number 0 – 99999999.99 with two digits to the right of the decimal point can be accepted to modify this field. The ImplementationActHours (536871110) is a decimal field.
30	Execution / Close Out	Actuals	Implementation – Payment Authorized Approval Date	A date can be accepted from the calendar editor or type a value to modify this field. ImplementationPayAuthDate (536870996) is a TimeStamp field. MM/DD/CCYY Edit Check: Equal/Less than Current Date.
31	Execution / Close Out	Actuals	Draft Documentation – Deliverables	A date can be accepted from the calendar editor or type a value to modify this field. Draft

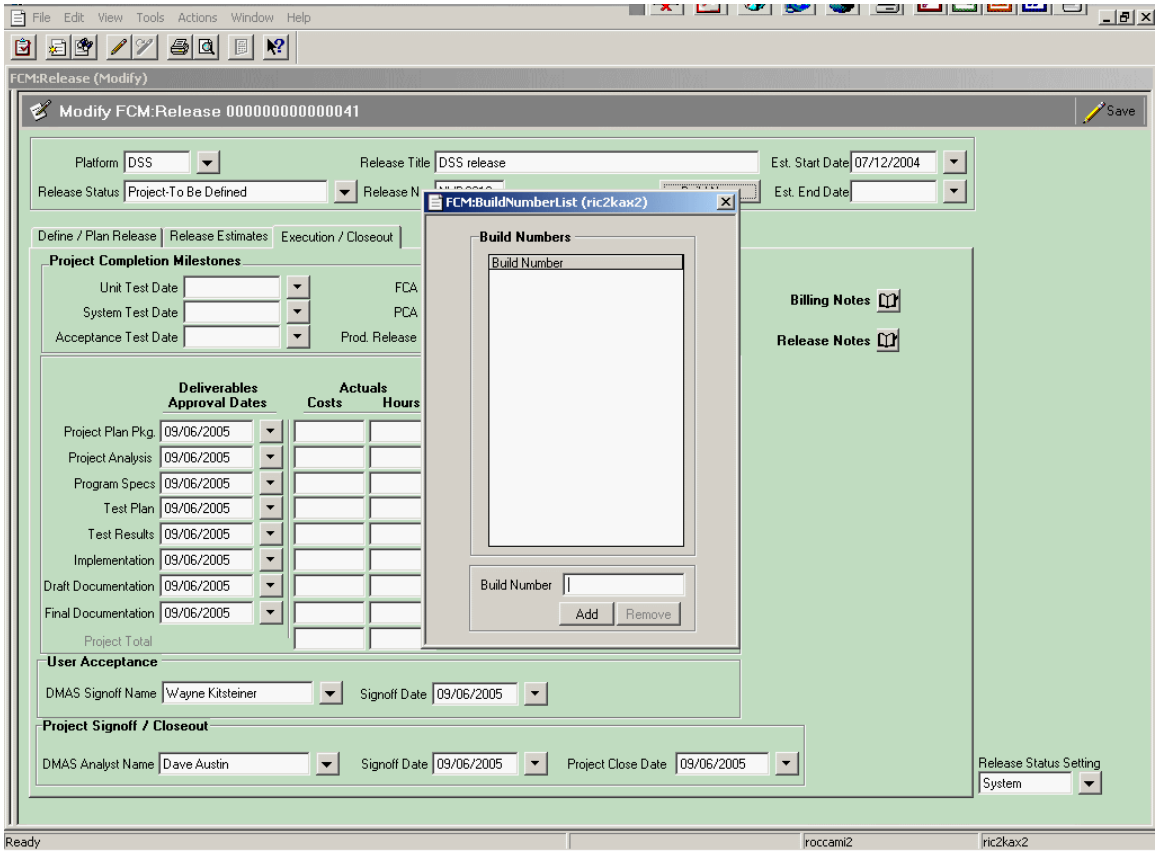
#	Tab Name	Group Name	Field Name	Instructions/Comments
			Approval Date	Documentation is a TimeStamp field. MM/DD/CCYY Edit Check: Equal/Less than Current Date.
32	Execution / Close Out	Actuals	Draft Documentation – Costs	A number 0 – 99999999.99 with two digits to the right of the decimal point can be accepted to modify this field. The DraftDocumentationActCosts (536871102) is a decimal field.
33	Execution / Close Out	Actuals	Draft Documentation – Hours	A number 0 – 99999999.99 with two digits to the right of the decimal point can be accepted to modify this field. The DraftDocumentationActHours (536871111) is a decimal field.
34	Execution / Close Out	Actuals	Draft Documentation – Payment Authorized Approval Date	A date can be accepted from the calendar editor or type a value to modify this field. DraftDocPayAuthDate (536870997) is a TimeStamp field. MM/DD/CCYY Edit Check: Equal/Less than Current Date.
35	Execution / Close Out	Actuals	Final Documentation – Deliverables Approval Date	A date can be accepted from the calendar editor or type a value to modify this field. Final Documentation is a TimeStamp field. MM/DD/CCYY Edit Check: Equal/Less than Current Date.
36	Execution / Close Out	Actuals	Final Documentation – Costs	A number 0 – 99999999.99 with two digits to the right of the decimal point can be accepted to modify this field. The FinalDocumentationActCosts (536871103) is a decimal field.
37	Execution / Close Out	Actuals	Final Documentation – Hours	A number 0 – 99999999.99 with two digits to the right of the decimal point can be accepted to modify this field. The FinalDocumentationActHours (536871112) is a decimal field.
38	Execution /	Actuals	Final	A date can be accepted from the

#	Tab Name	Group Name	Field Name	Instructions/Comments
	Close Out		Documentation – Payment Authorized Approval Date	calendar editor or type a value to modify this field. FinalDocAuthDate (536871054) is a TimeStamp field. MM/DD/CCYY Edit Check: Equal/Less than Current Date.
39	Execution / Close Out	Actuals	Project Total - Costs	A number 0 – 99999999.99 with two digits to the right of the decimal point can be accepted to modify this field. The ProjectTotalActCosts (536871104) is a decimal field.
40	Execution / Close Out	Actuals	Project Total - Hours	A number 0 – 99999999.99 with two digits to the right of the decimal point can be accepted to modify this field. The ProjectTotalActHours (536871113) is a decimal field.
41	Execution / Close Out	User Acceptance	DMAS Signoff Name	Select name of DMAS Originator providing User Acceptance for Approved Release/Project. FCM:MNU:Personnel:DMASSignoff menu to modify this field. DMAS Signoff Name is a character field and can contain up to 50 characters.
42	Execution / Close Out	User Acceptance	Signoff Date	A date can be accepted from the calendar editor or type a value to modify this field. Signoff Date is a TimeStamp field. MM/DD/CCYY Edit Check: Equal/Less than Current Date.
43	Execution / Close Out	Project Signoff / Closeout	DMAS Analyst Name	Type letters, numbers, symbols or keywords or choose an option from the FCM:MNU:Personnel:DMASAnalyst menu to modify this field. DMAS Analyst Name is a character field and can contain up to 50 characters.
44	Execution / Close Out	Project Signoff / Closeout	Signoff Date	A date can be accepted from the calendar editor or type a value to modify this field. Signoff Date is a TimeStamp field. MM/DD/CCYY . Edit Check: Equal/Less than Current Date.
45	Execution /	Project Signoff	Project Close	A date can be accepted from the

#	Tab Name	Group Name	Field Name	Instructions/Comments
	Close Out	/ Closeout	Date	calendar editor or type a value to modify this field. Project Close Date is a TimeStamp field. MM/DD/CCYY Edit Check: Equal/Less than Current Date.

- Information on other fields related to this screen is as follows:

#	Tab Name	Group Name	Field Name	Instructions/Comments
1	Execution / Close Out	-	Build No …	Screen shown below is displayed when 'Build No …' is clicked. All Build Numbers supplied by FHS to implement the Approved Release/Project in production are entered. Can contain up to 20 characters.

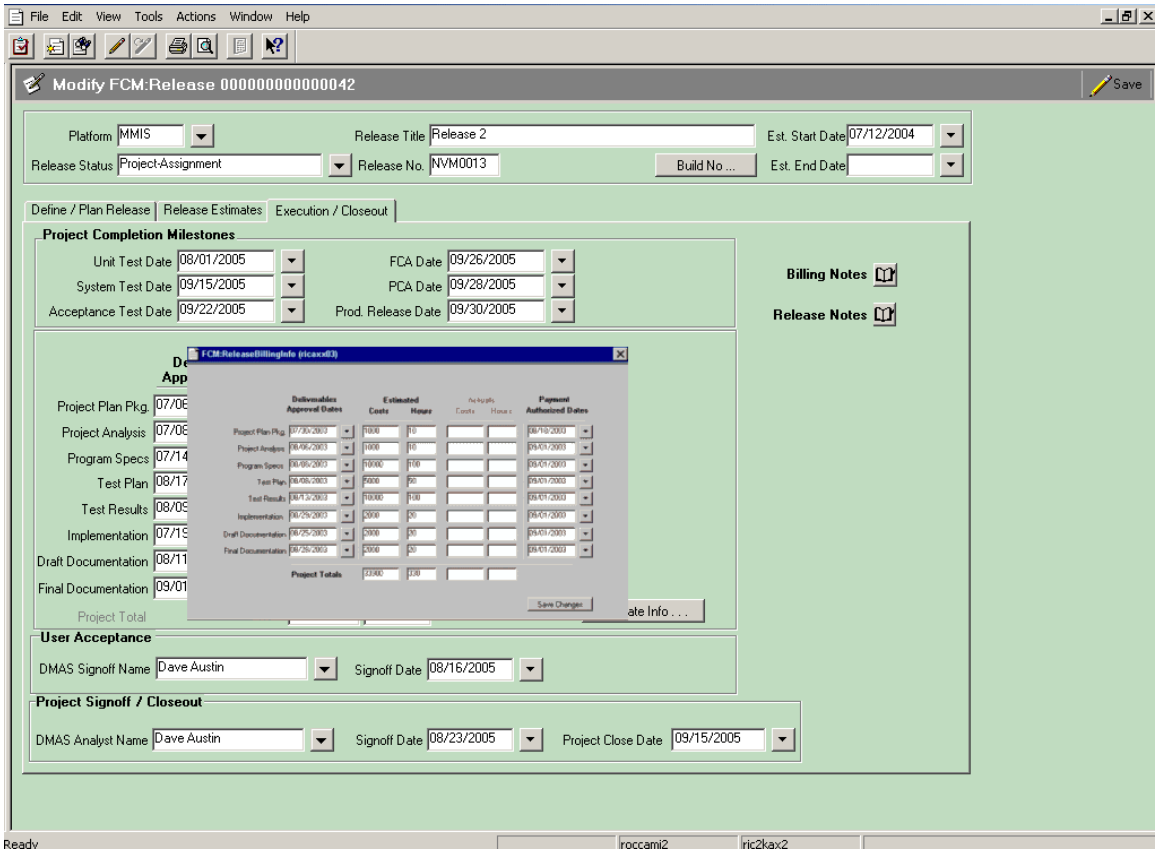


- Information on other fields related to this screen is as follows:

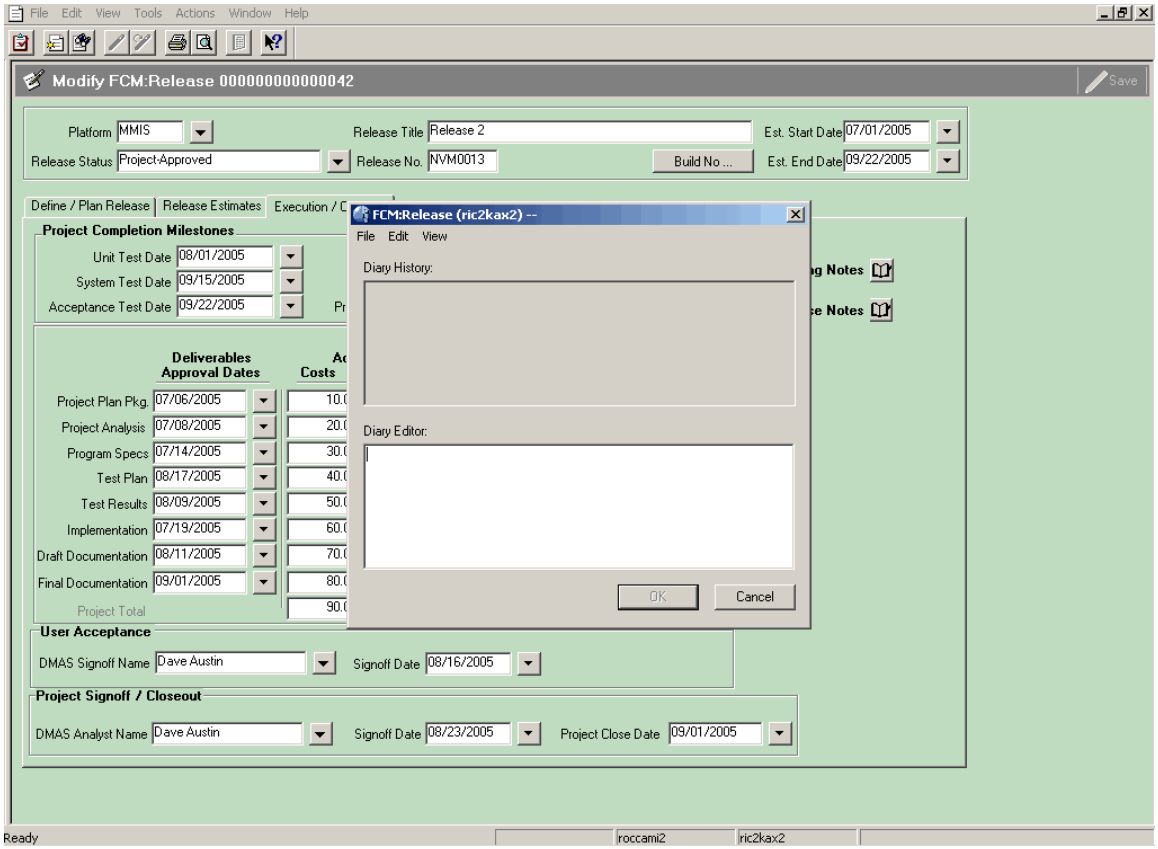
#	Tab Name	Group Name	Field Name	Instructions/Comments
1	-	Build No …	Build Number	Any number, letter, symbol or keyword can be accepted. Build Number field is a character field and can contain up to 20 characters. When 'Add' is clicked, data will be added to 'Build Numbers' list on the. FCM:BuildNumberList screen. When data is double clicked on the 'Build Numbers' list, the 'Remove'

#	Tab Name	Group Name	Field Name	Instructions/Comments
				button is enabled. When 'Remove' button is clicked, data will be deleted from 'Build Numbers' list on the FCM:BuildNumberList screen.

#	Tab Name	Group Name	Field Name	Instructions/Comments
2	Execution / Close Out	Actuals	Estimate Information …	Screen shown below is displayed when 'Estimate Information …' is clicked. This provides a facility to have the estimates and actuals side by side. Information can be entered on it and it will be captured and shown on 'Release Estimates' and 'Release Execution/ Close Out' tabs.



#	Tab Name	Group Name	Field Name	Instructions/Comments
4	Execution / Close Out	-	Billing Notes	When the diary icon shown on the right side of the 'Billing Notes' is clicked, FCM:Release Screen shown below is displayed. This allows previous Billing Notes to be seen under 'Diary History'. Additional notes can also be made through 'Diary Editor' by DMAS CM Coordinator. 'Billing Notes' (536870983) is a diary field and can contain up to 32,000 characters. *Note: <u>All entries</u> are stored under 'Diary History' with day, date, time, & user ID of person making the entry.*

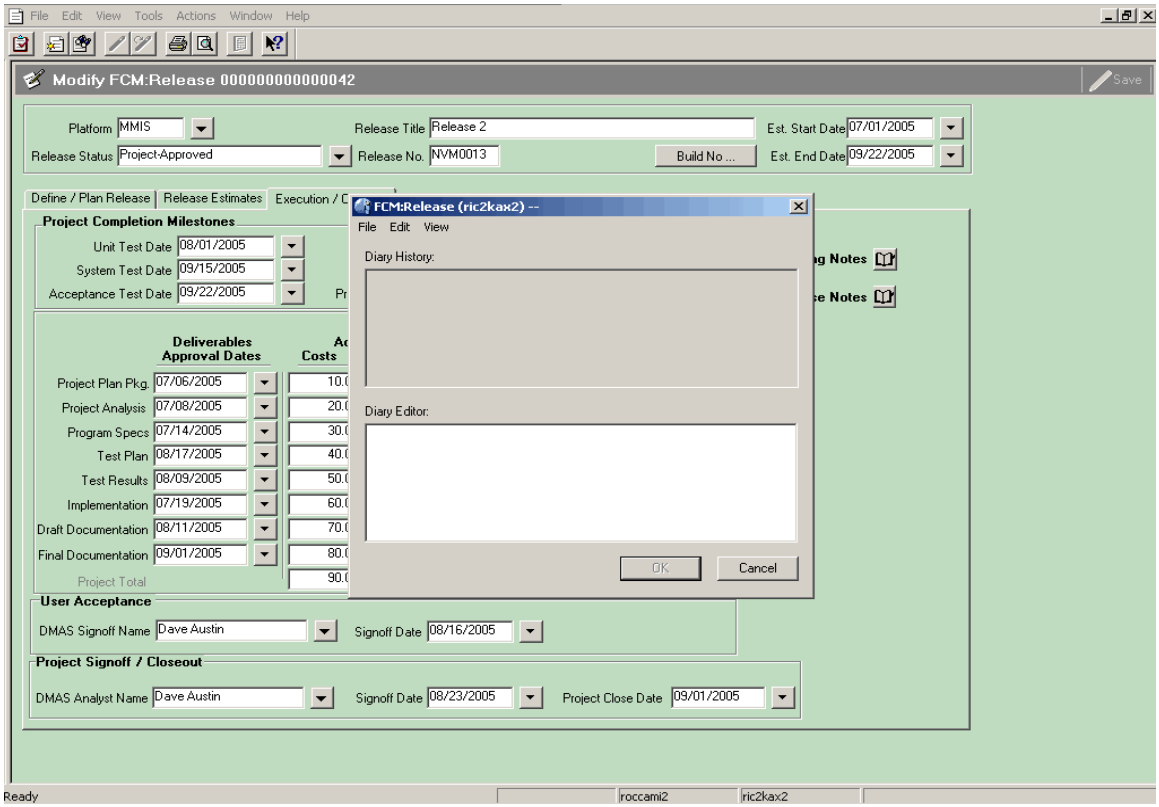


Note: Copy/paste functions can be used to copy information from 'Diary History' into 'Diary Editor'. This can be done as follows:

a. *Highlight the portion to be copied from 'Diary History'.*
b. *Select 'Edit/Copy' from menu at top of popup.*
c. *Place cursor in 'Diary Editor'.*

d. Select 'Edit/Paste' from menu at top of popup.

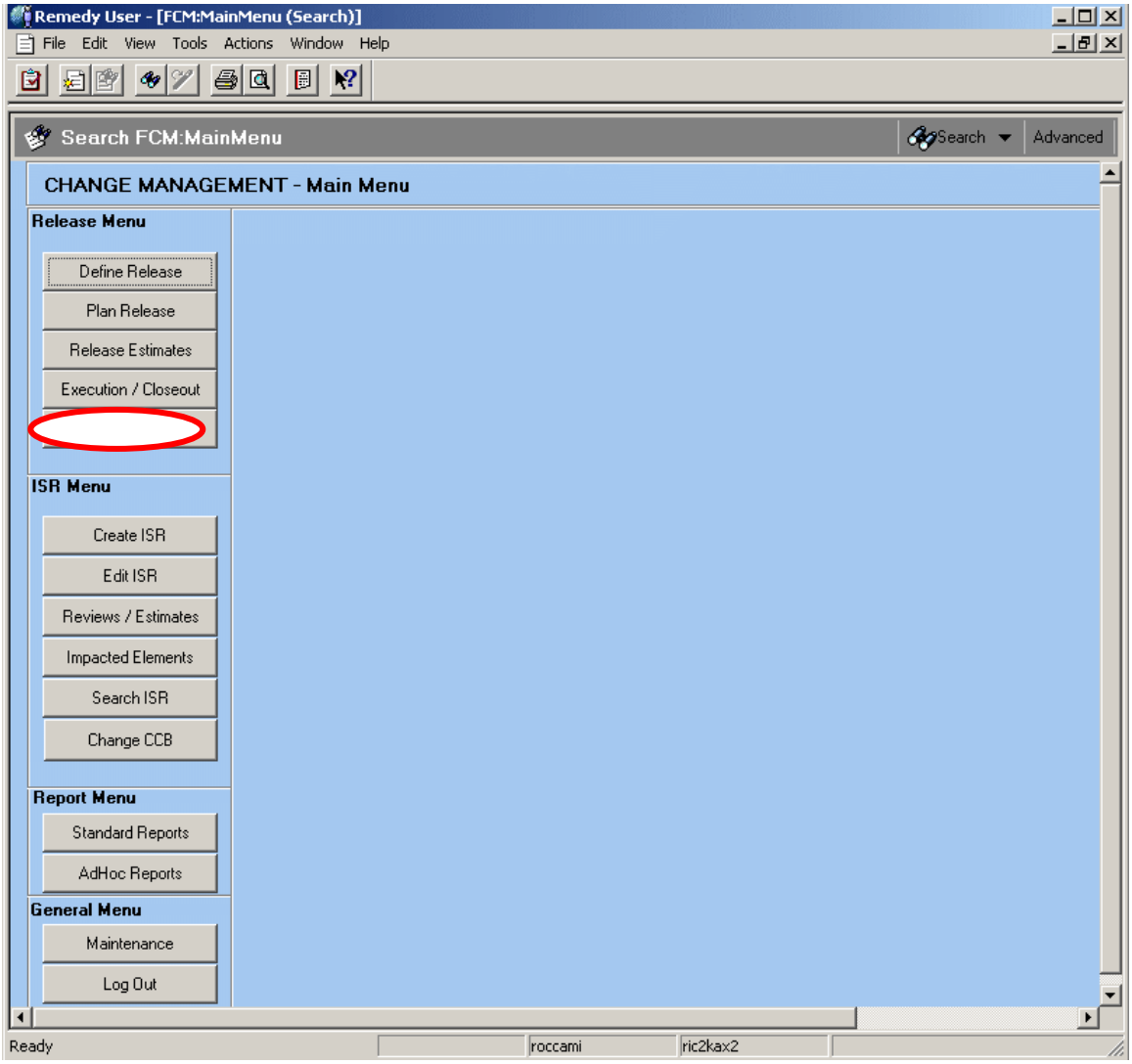
#	Tab Name	Group Name	Field Name	Instructions/Comments
5	Execution / Close Out	-	Release Notes	Click on the diary icon shown on the right side of the 'Release Notes'. Screen shown below is displayed. This allows previous Release Notes to be seen under 'Diary History'. Additional notes can also be made through 'Diary Editor' by DMAS CM Coordinator. 'ReleaseNotes' (536871018) is a diary field and can contain up to 32,000 characters. *Note: <u>All entries</u> are stored under 'Diary History' with day, date, time, & user ID of person making the entry.*



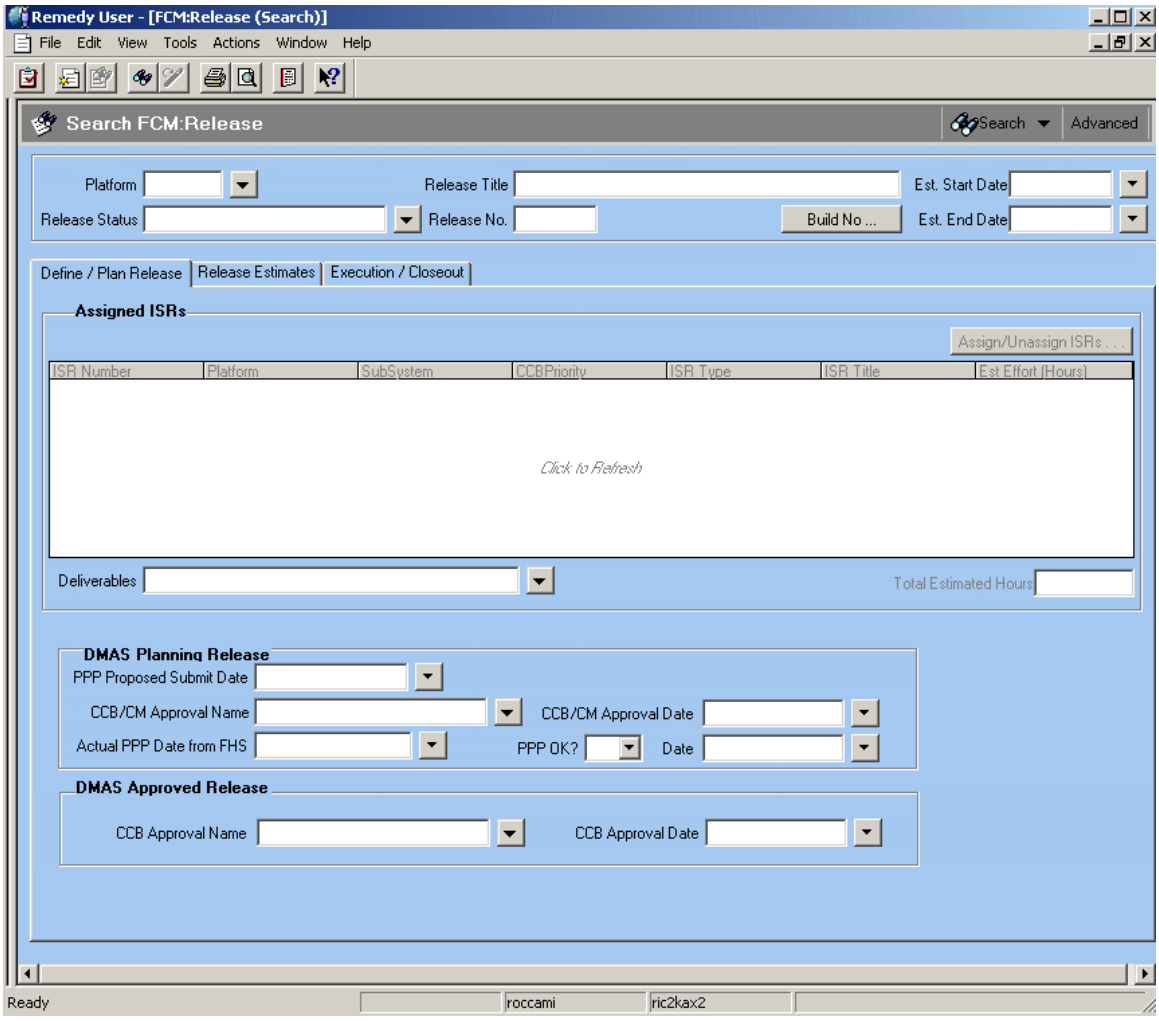
Note: Copy/paste functions can be used to copy information from 'Diary History' into 'Diary Editor'. This can be done as follows:

a. Highlight the portion to be copied from 'Diary History'.
b. Select 'Edit/Copy' from menu at top of popup.
c. *Place cursor in 'Diary Editor'.*
d. Select 'Edit/Paste' from menu at top of popup.

Release Menu – 'Search Release'



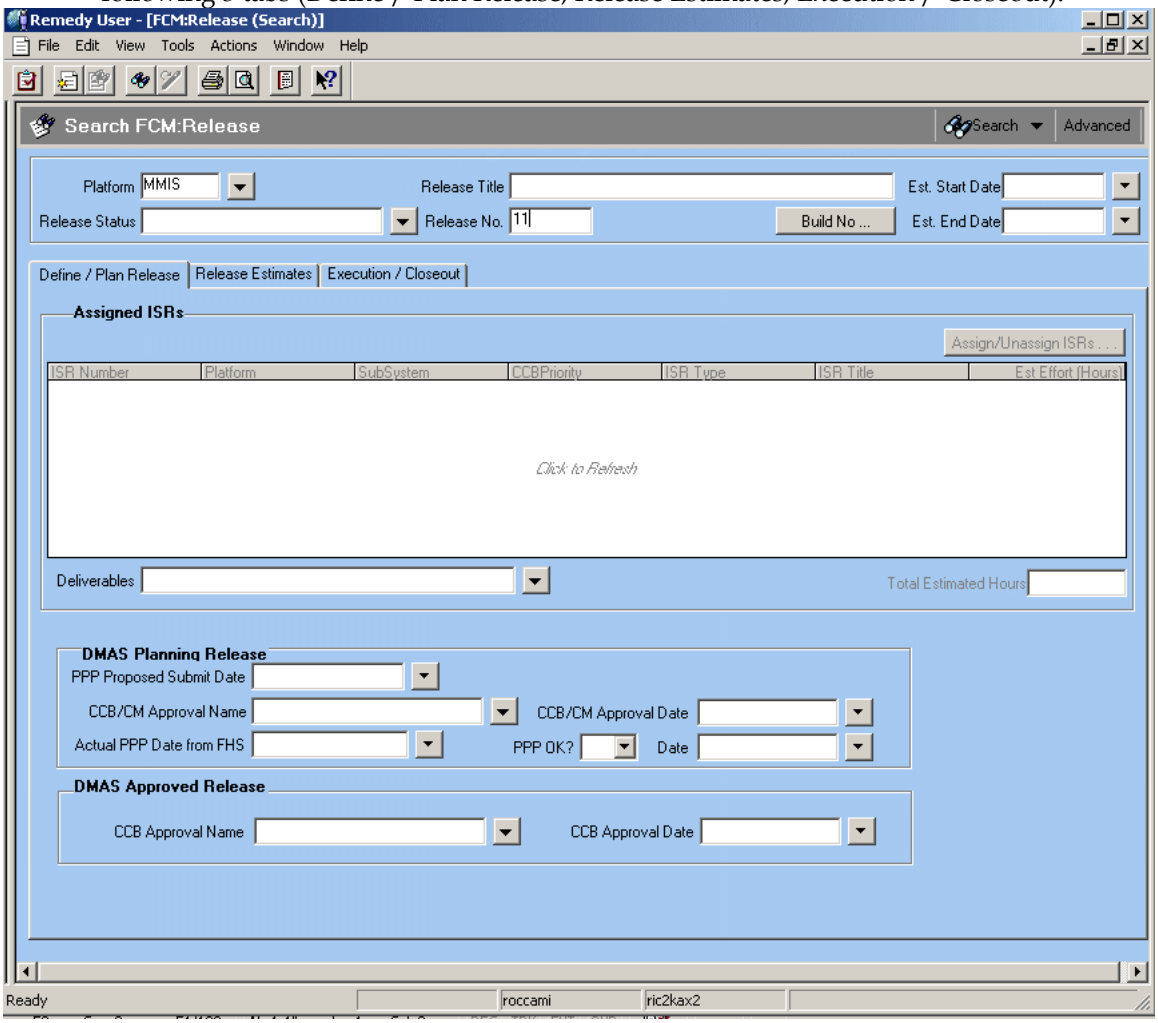
- 'Search Release' provides the facility to search for specific Releases.
- Click on 'Search *Release*' and the screen shown below is displayed.



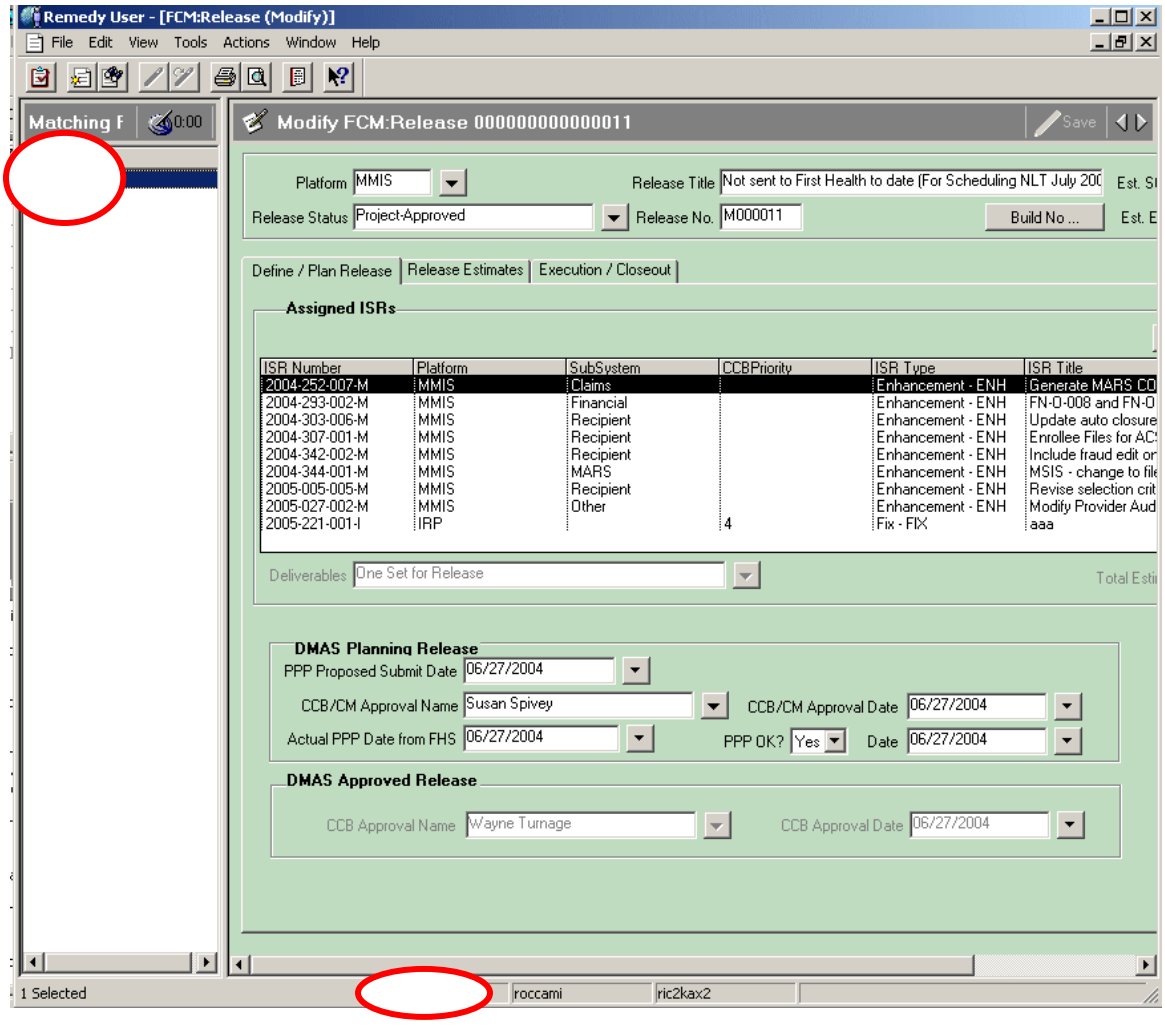
'Search Release'- Example

- Enter the required search criteria in one or more fields. In this example, the search criteria is to find Release 11.

  Note #1: Search criteria can be entered for any of the available fields across the following 3 tabs (Define / Plan Release, Release Estimates, Execution / Closeout).

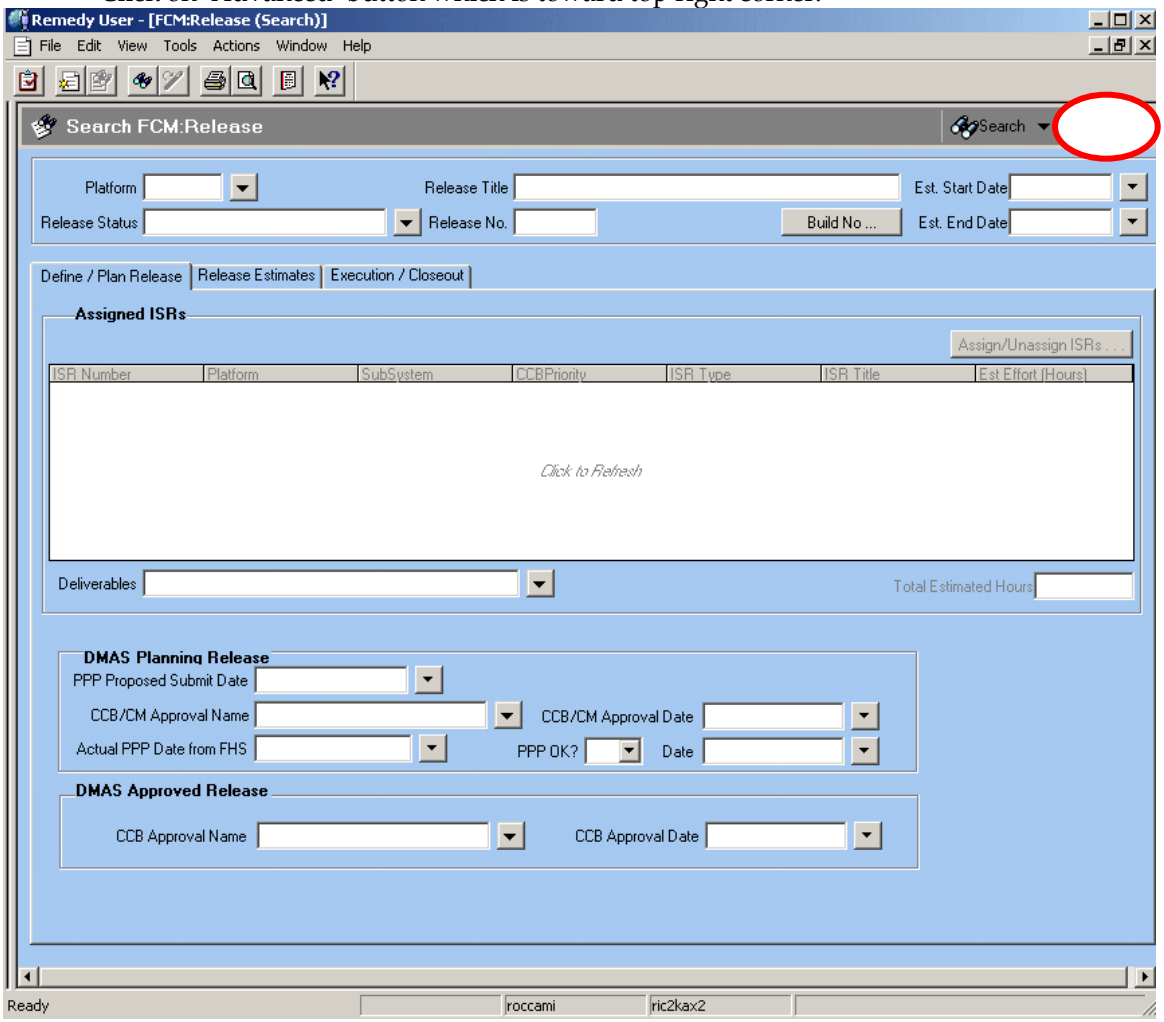


- Results of the search are displayed on a split screen as shown below. The frame to the left shows the Release number while the frame on the right shows the ISR Number, Platform, Subsystem, CCBPriority, ISR Type and ISR Title.
- Number of Releases found can be seen to the left pane as well as the bottom of the screen.

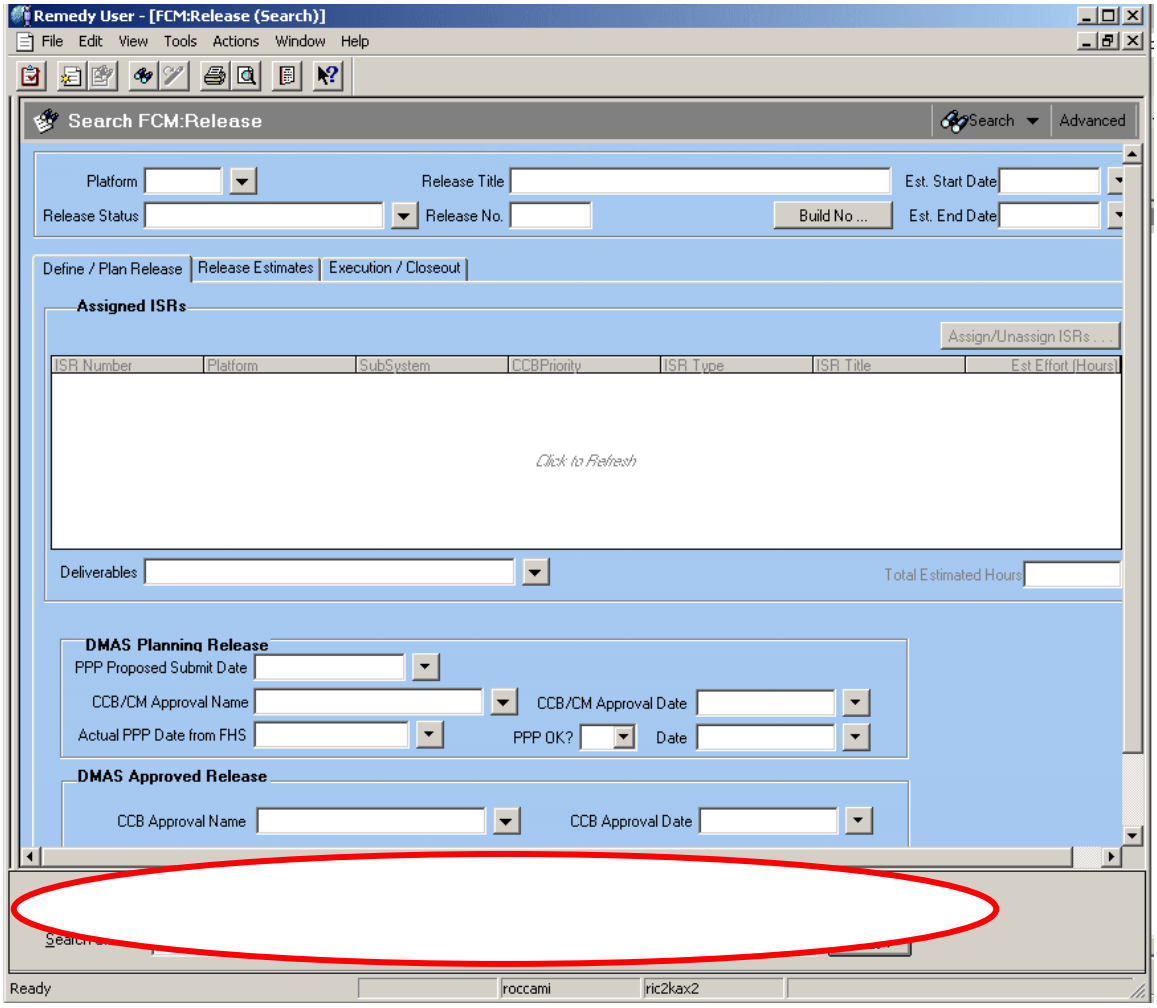


'Search Release' Advanced Search – Example

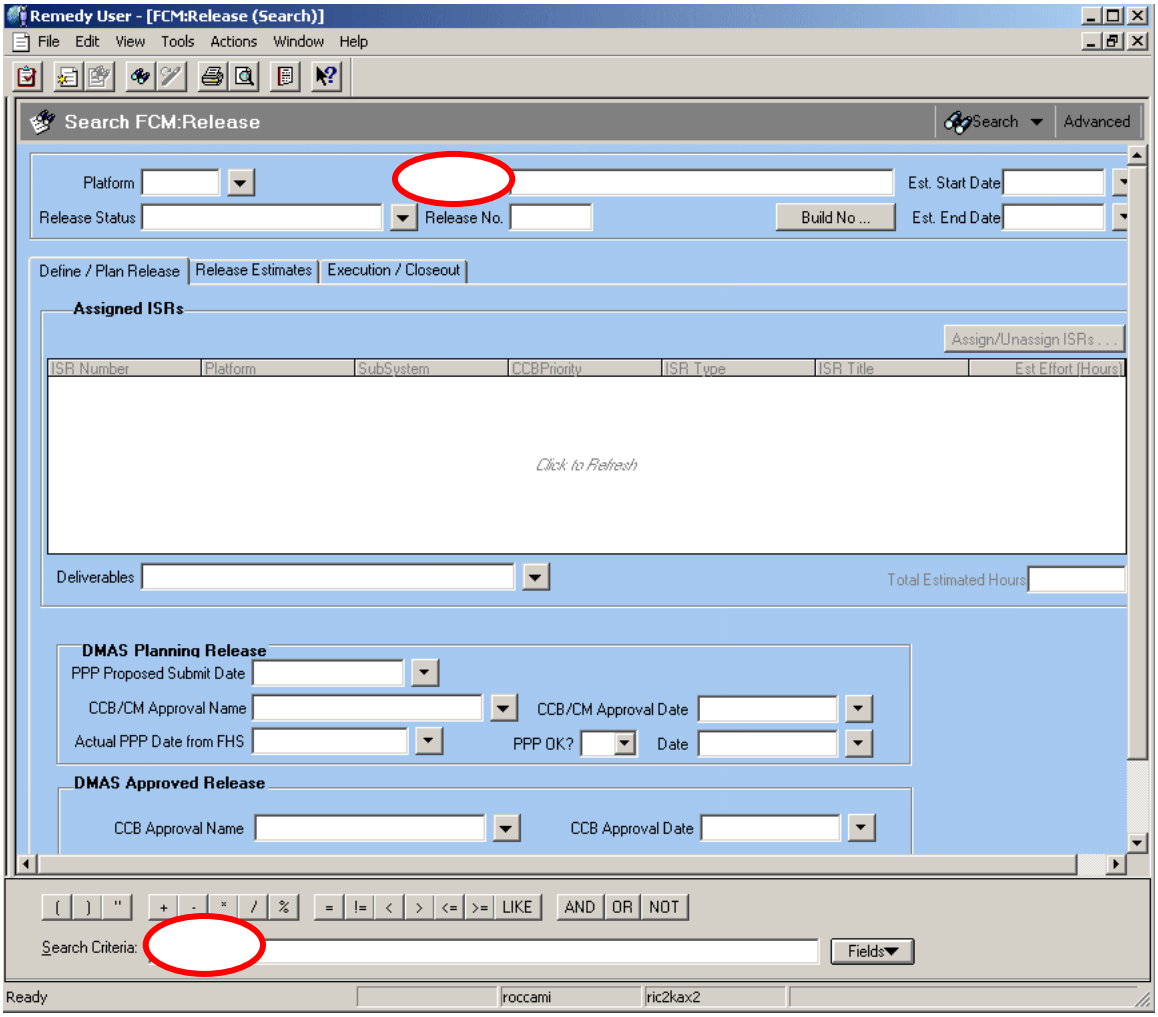
- Advanced Search function allows the user to perform more sophisticated searches for Releases which satisfy required criteria.
- Click on 'Advanced' button which is toward top right corner.



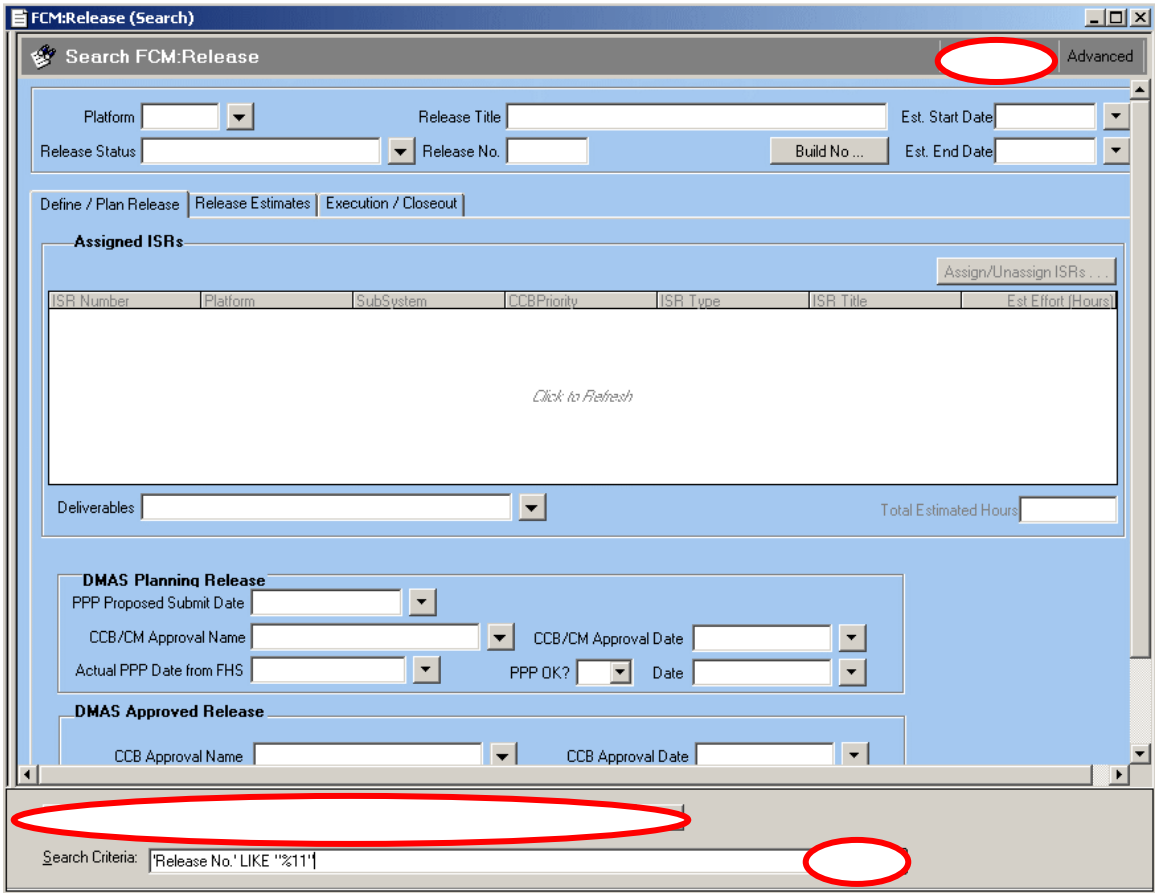
- Screen shown below is displayed. A dialog box is available at the bottom of the screen to specify the search criteria.



- Name of the field is entered by clicking on the label next to the field of interest (as shown on the screen below). This will automatically enter the name with the proper format in the `Search Criteria` dialog box.

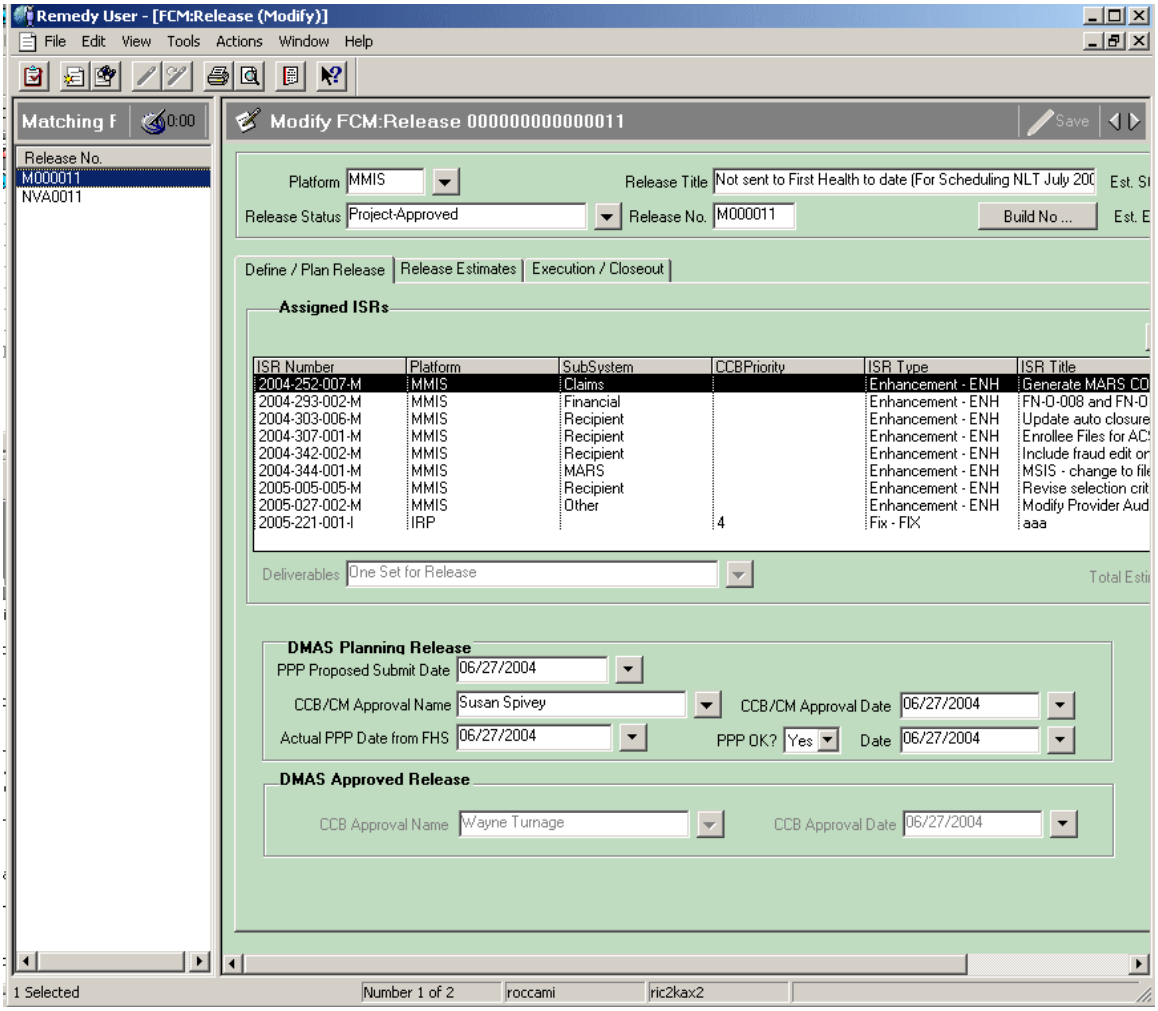


- Enter the remaining criteria by keying in the information using the toolbar above `Search Criteria` dialog box to ensure proper format. Click on the `Search button' which is towards top right corner to initiate the search.

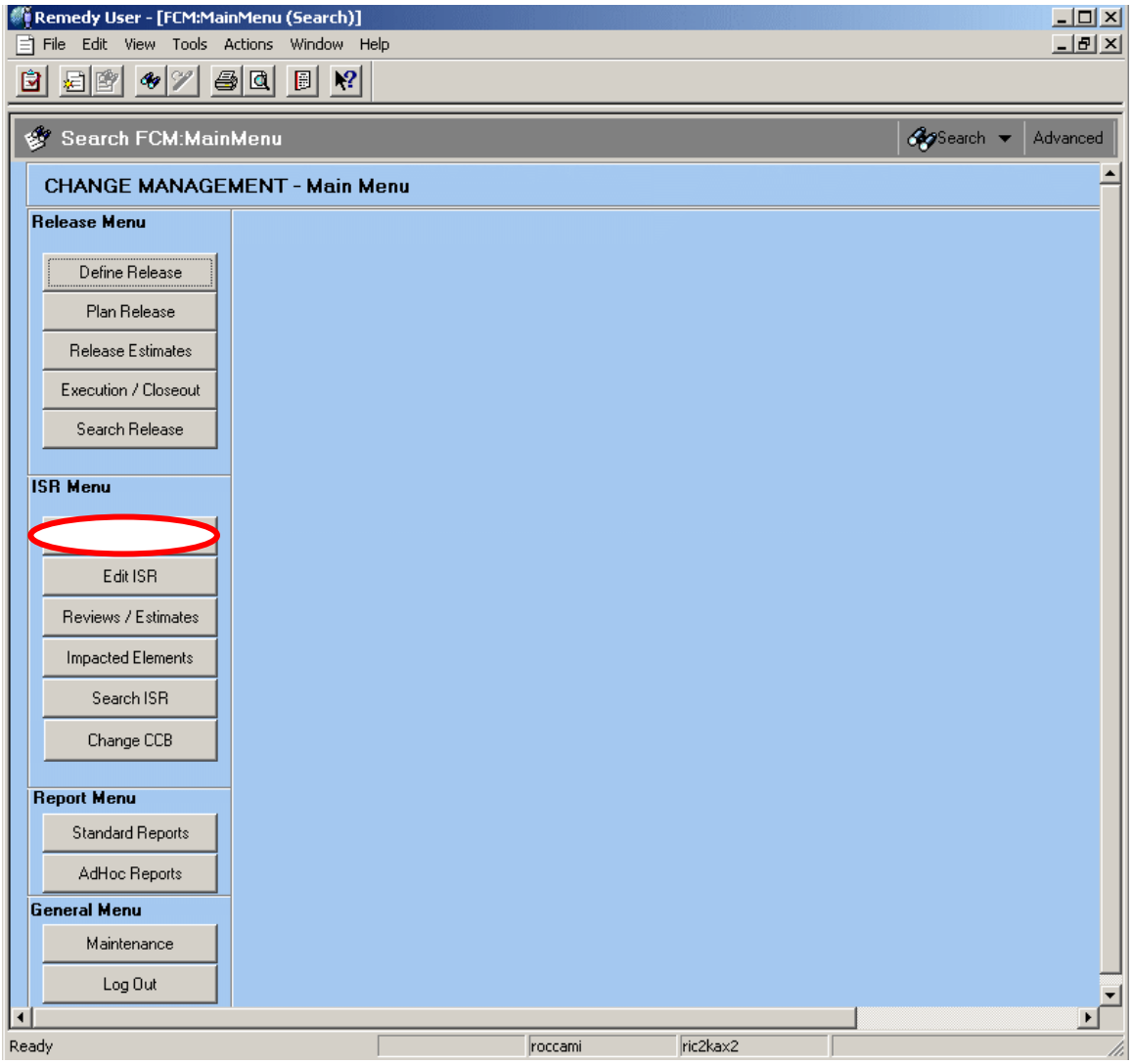


- Example in the `Search Criteria` dialog box is to do a search where `Release Number` begins with 11.

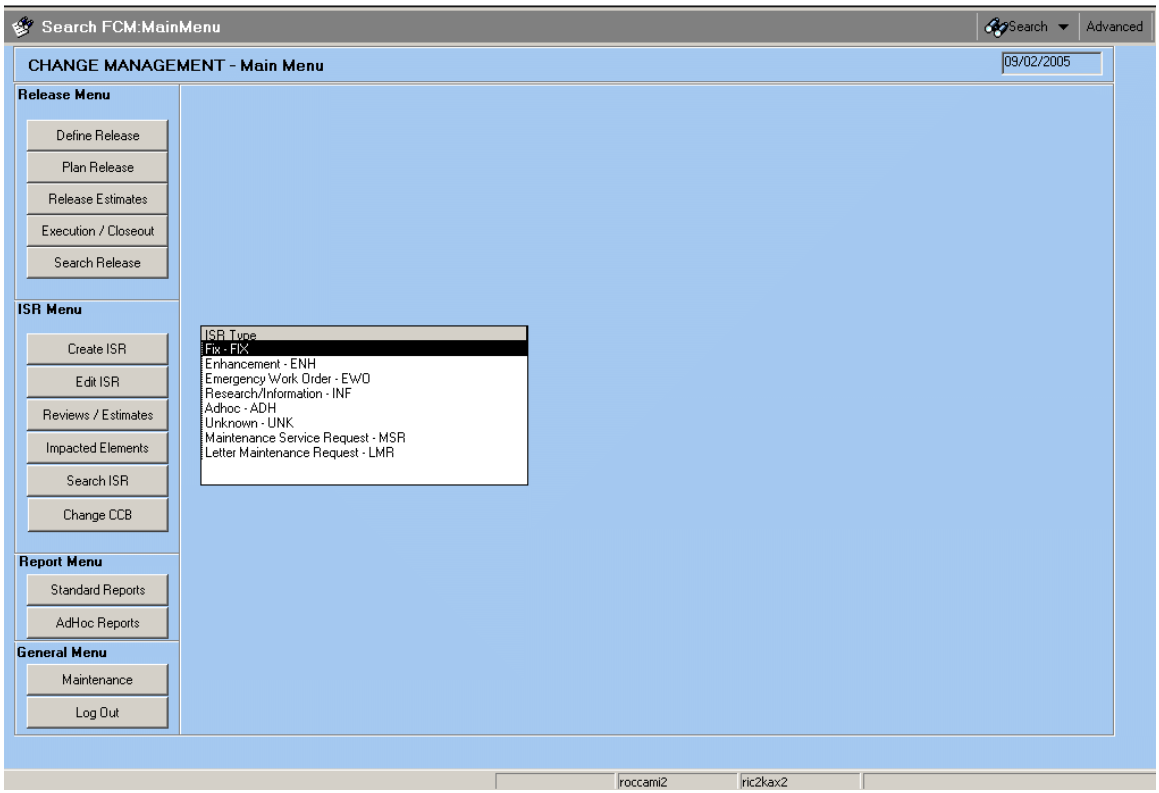
- Results of the search are displayed on a split screen as shown below. Left frame shows all the Release numbers fulfilling the entered criteria while the right frame displays all of the ISR's associated with this release. Select any ISR on the list by clicking on it and details of the selected ISR will be displayed.
- Number of releases satisfying the search can be found in the left pane or at the bottom of the screen.



ISR Menu – 'Create ISR'



- 'Create ISR' is used by DMAS and FHS to create different types of ISR. This is accessible by DMAS Originator, FHS Team Lead, DMAS IM Analyst, FHS CM Coordinator and DMAS CM Coordinator.
- Click on 'Create ISR' option under 'ISR Menu' and the screen shown below is displayed.



- List of available ISR Types are shown. Double click on the appropriate type of ISR to be created.

- **IMPORTANT NOTES**
  - For FHSC user, list of available ISR Types is not displayed as the only applicable /available option is 'Fix – FIX' (default). In this case, the user is taken directly to 'Regular ISR Form (Base version)'.
  - Two different forms are used for creating an ISR. All ISR Types use the Regular ISR Form except for 'ADH' which uses the Adhoc ISR Form.
  - All ISR Types have one (1) tab of information (ISR Details), except for LMRs and MSRs (a second tab for each is displayed for entry). An additional tab for documentation will appear after the initial new ISR is saved.

All ISR Types (except 'Adhoc')

- Field name having an '(R)' following it indicates a required field when creating an ISR. These fields will be checked to ensure a value is entered before the ISR is considered to be complete and ready for approval by Division Director.
- 'ISR Status' can have the following values:

  - **New-Draft**: Initial setting when ISR is being created.

  - **New**: ISR has been created with all required fields and 'Print ISR – Final' is selected which means it is ready for the approval of Division Director.

  - **Ready-Division Director Approved**: Set when Division Director related 'Approved?' field is set to 'Yes'. This indicates that the Division Director has approved the ISR.

  - **Ready-For CCB**: Set when 'Date Received from FHS' and 'Est. Effort (Hours)' fields are entered - *applicable for ISR Types 'ENH' and 'EWO' only*. This indicates receipt of the Impact Assessment for the ISR by DMAS, the future approval of IA and prioritization of ISR by CCB (DMAS).

  - **Approved-CCB-Pending Baseline Assignment**: Set when 'CCB/CM Approval' fields (CCB/CM approval and CCB/CM approval date) are entered - *applicable for ISR Types 'ENH' and 'EWO' only*. This indicates the ISR approval and prioritization by CCB (DMAS).

  - **Approved-Assigned to Baseline/Project**: Set when 'Release No.' field is entered - *applicable for ISR Types 'ENH' and 'EWO' only*. This indicates the assignment of ISR to a Release by DMAS (refer to 'Assign/Unassign ISRs' function within 'Release Menu – Plan Release' option for more details).

  - **Approved**: Set when 'CCB/CM Approval' field is entered - *applicable for ISR Types 'FIX, 'INF, 'LMR', 'MSR' only*. This indicates the approval of ISR by CM Manager.

    Note: For all ISRs included in a Release, this 'ISR Status' value is automatically set when 'Release Status' field is set to 'Project-Approved' (refer to 'Release Menu – Define Release' option for more details).

  - **In-Progress**: Set when FHS 'Date Received' field is entered and indicates the start of work on ISR by FHS.

Note: For any ISR included in a Release, the setting of this 'ISR Status' value will automatically update the 'Release Status' field to 'Project-In-Progress' (refer to 'Release Menu – Define Release' option for more details).

- **Complete-Awaiting Billing**: Set when User Acceptance 'DMAS Signoff Date' field is entered and indicates DMAS acceptance of the ISR completed work. *Applicable for ISR types EWO and Releases.*

  Note: For all ISRs included in a Release, this 'ISR Status' value is automatically set when 'Release Status' field is set to 'Complete-Awaiting Billing' (refer to 'Release Menu – Execution/Closeout' option for more details).

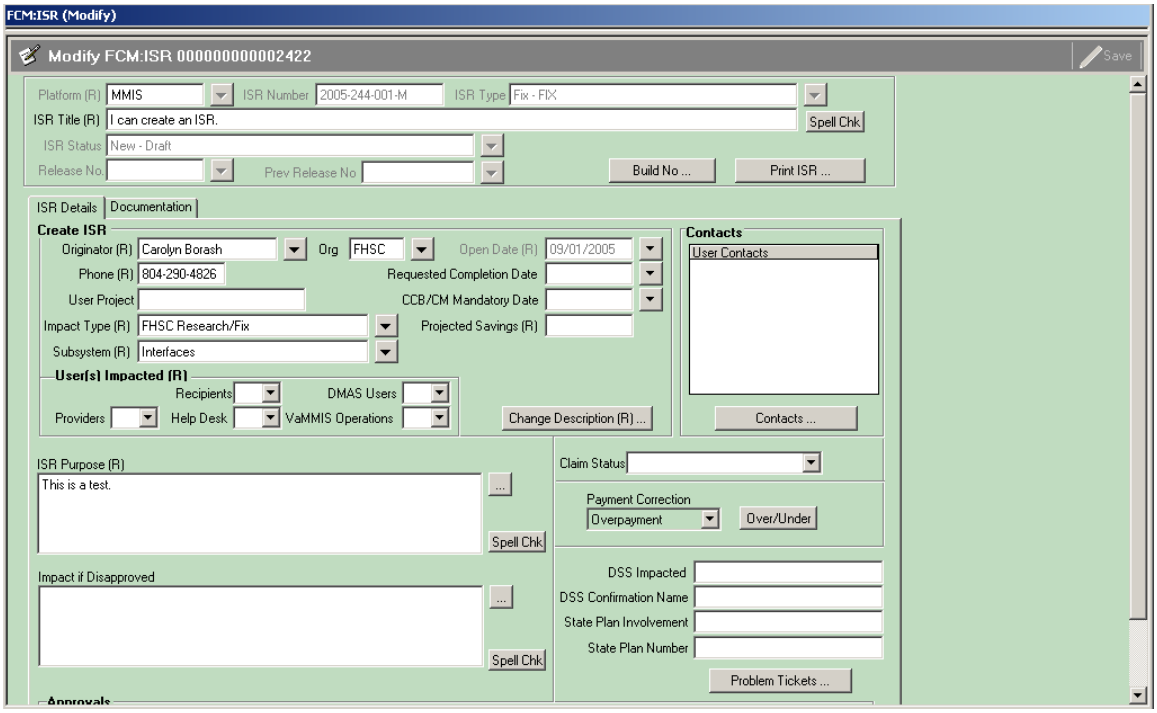
- **Closed-Complete**: Set when 'Close Date' field is entered and indicates the verification/acceptance of all deliverables as well as payment having been made for the ISR related invoice(s) when required.

- **Closed-Cancelled**: Set when Division Direction related 'Approved?' field is set to 'No' or 'CCB/CM Disapproval Date' field is entered. This indicates the disapproval and cancellation of an ISR by Division Director, CM Manager, CM Coordinator, or CCB (DMAS).

- **Deferred**: Set when 'CCB/CM On Hold Date' field is entered. This indicates the deferring of an ISR.

- ISR Types 'FIX', 'ENH', 'EWO', 'UNK', 'INF' use the Regular ISR Form (Base version) while 'MSR' and 'LMR' have an additional tab. Screen layouts of the different forms are shown below.

Regular Form (Base version)



- Information on the fields related to the 'Create ISR' function is shown in the table below.

Note: 'Platform' and 'ISR Title' fields entered and must be saved in order for the fields on the 'ISR Details' tab to be enabled.

#	Tab Name	Group Name	Field Name	Instructions/Comments
1	-	-	Platform (R)	The Platform (R) is a selection field. Select value from drop-down list: MMIS, IRP or Other.
2	-	-	ISR Number	System generated after 'Platform' has been selected and entry of 'ISR Title' information has been saved. CCYY-999-001-X CCYY – Year 999 – Julian Date 001 – Sequence number X – Platform (M – MMIS, I – IRP or O – Other) of the creation date.
3	-	-	ISR Type	System generated after ISR Type is selected on earlier screen. Exception: Field is enabled for

#	Tab Name	Group Name	Field Name	Instructions/Comments
				ISR Type 'Unknown – UNK'. This has to be changed to one of the other ISR Types before it is considered to be ready for approval by DMAS Division Director by selecting 'final' or selecting 'draft' on Print screen.
4	-	-	ISR Title (R)	Any letters, numbers, symbols or keywords can be accepted. The ISR Title (R) field is 69 characters.
5	-	-	Release No.	System generated when ISR is assigned to a particular Release. Refer to 'Plan Release' for more details. Note: for CM Coordinator use only.
6	-	-	Prev Release No.	System generated if ISR was moved from one release to another release. This displays the previous release number assigned. Note: for CM Coordinator use only.
7	-	-	Build No.	All Build Numbers supplied by FHS to implement the Approved Release/Project in production are entered. FHS/DMAS CM Coordinator use only. Can contain up to 20 characters.
8	-	-	ISR Status	System generated according to the progress of the ISR on the defined ISR process. Details of settings for 'ISR Status' can be found above the screen display.
9	ISR Details	Create ISR	Originator (R)	System generated name of DMAS Originator or FHS Coordinator. Default: Name associated to user ID (part of application security setup). Additionally, type letters, numbers, symbols or keywords or choose an option from the FCM:MNU:Personnel menu to modify this field. Originator (R) is a character field and can contain up to 50 characters.

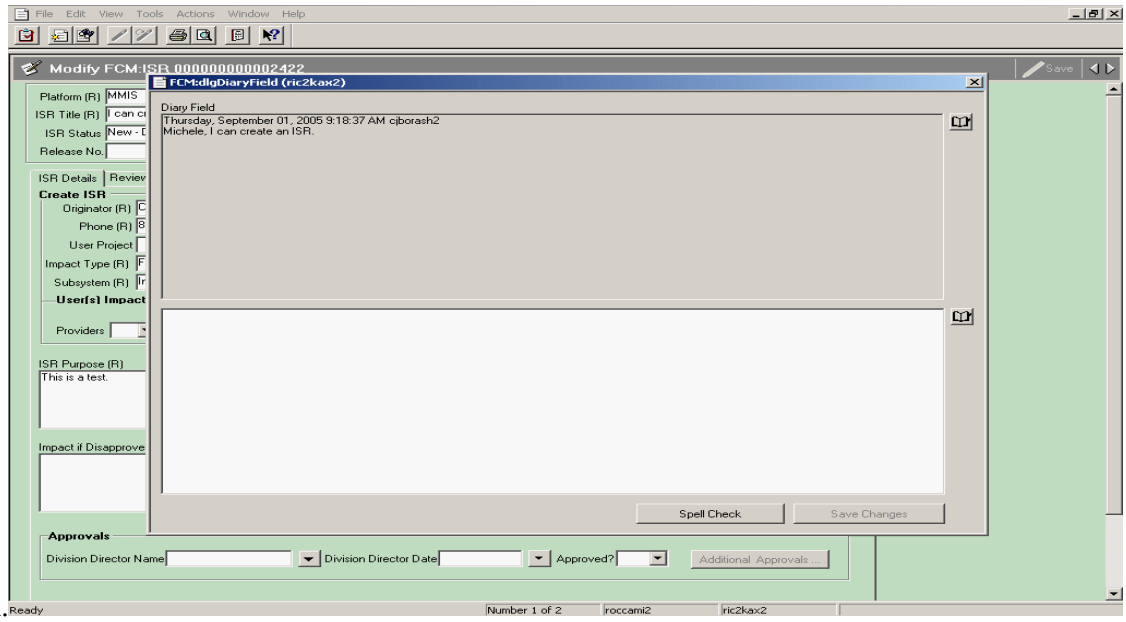
#	Tab Name	Group Name	Field Name	Instructions/Comments
10	ISR Details	Create ISR	Org.	System generated according to organization of Originator.
11	ISR Details	Create ISR	Open Date (R)	System generated date. MM/DD/CCYY Note: Date is the date the ISR was created and cannot be modified.
12	ISR Details	Create ISR	Phone (R)	Phone number can be accepted or pulled from FCM:Personnel. The Phone (R) field can contain 15 characters.
13	ISR Details	Create ISR	Requested Completion Date	Select a date from the calendar editor or type a value to modify this field. Requested Completion Date is a TimeStamp field. MM/DD/CCYY Edit Check: Greater than Current Date.
14	ISR Details	Create ISR	User Project	Any letters, numbers, symbols or keywords can be accepted. The User Project field is 50 characters. Note: Enter grouping under which ISR is to be reported. User Project is disabled for ISR Type 'MSR' and 'LMR' as it is not applicable.
15	ISR Details	Create ISR	CCB/CM Mandatory Date	Select a date from the calendar editor or type a value to modify this field. CCB/CM Mandatory Date is a TimeStamp field. MM/DD/CCYY Edit Check: Greater than Current Date.
16	ISR Details	Create ISR	Impact Type (R)	A value is selected to modify this field. The Impact Type (R) field is a Selection field The selection types are 'Audit Requirement', 'Cost Savings Initiative', 'FHSC Other', 'FHSC Performance Issue', 'FHSC Production Support', 'FHSC Recovery/Data', 'FHSC Research/Fix', 'Mandated Policy

#	Tab Name	Group Name	Field Name	Instructions/Comments
				Change by CMS', 'Mandated Policy Change by General Assembly', 'Mandated Policy Change by Other', 'Operational Efficiency', 'Other' and 'System Fix'.
17	ISR Details	Create ISR	Projected Savings (R)	A number can be accepted between 0 and 2,147,483,647 to modify the field. Projected Savings (R) is an Integer field. Note: Enter numeric value only (no dollar ($) or decimal (.) is allowed. (for Michele)
18	ISR Details	Create ISR	Subsystem (R)	A value is selected to modify this field. The Subsystem (R) field is a Selection field The selection of subsystems are: 'AVRS', 'All', 'Automailing', 'Claims', 'Drug', 'EPSDT', 'Financial', 'First IQ', 'First Rebate', 'Global', 'Interfaces', 'MARS', 'Other', 'Provider', 'Recipient', 'Reference' and 'SAS'.
19	ISR Details	User(s) Impacted	Providers (R)	A value is selected to modify this field. The Providers (R) field is a Selection field. The selections are 'Yes', 'No' and 'clear'. Providers (R) is disabled for ISR Type 'MSR' and 'LMR' as it is not applicable.
20	ISR Details	User(s) Impacted	Recipients (R)	A value is selected to modify this field. The Recipients (R) field is a Selection field. The selections are 'Yes', 'No' and 'clear'. Recipients (R) is disabled for ISR Type 'MSR' and 'LMR' as it is not applicable.
21	ISR Details	User(s) Impacted	DMAS Users (R)	A value is selected to modify this field. The DMAS Users (R) field is a Selection field. The selections are 'Yes', 'No' and 'clear'. DMAS Users (R) is disabled for ISR Type 'MSR' and 'LMR' as it is not applicable.
22	ISR Details	User(s) Impacted	Help Desk (R)	A value is selected to modify this field. The Help Desk (R)

#	Tab Name	Group Name	Field Name	Instructions/Comments
				field is a Selection field. The selections are 'Yes', 'No' and 'clear'. Help Desk (R) is disabled for ISR Type 'MSR' and 'LMR' as it is not applicable.
23	ISR Details	User(s) Impacted	VaMMIS Operations (R)	A value is selected to modify this field. The VAMMIS Operations (R) field is a Selection field. The selections are 'Yes', 'No' and 'clear'. VaMMIS Operations (R) is disabled for ISR Type 'MSR' and 'LMR' as it is not applicable.
24	ISR Details	Create ISR	ISR Purpose (R)	Any amount of letters, numbers, symbols or keyword can be typed to modify ISR Purpose (R) field. ISR Purpose (R) can contain Unlimited characters.
25	ISR Details	Create ISR	Change Description (R)	When the Change Description (R) Control button is clicked, the screen shown below (1a) at end of this table is displayed. This shows the previous entry of the Change Description in upper box and a new entry or modification can be made using the lower box. 'Change Description' is a diary field and can contain up to 32,000 characters. Note: Saving a 'Change Description' entered in the lower box replaces all entries shown in the upper box. A warning popup will appear when saving the change to prevent any inadvertent replacements. 'Yes' will replace any entry. 'No' and clicking the 'X', will add the entry to the list of other entries.
26	ISR Details	Create ISR	Impact if Disapproved	Any amount of letters, numbers, symbols or keyword can be typed to modify Impact if Disapproved field. Impact if Disapproved can contain Unlimited characters.
27	ISR Details	-	Contacts	FCM:UserContactResources screen shown below (1b) is displayed when 'Contacts'

#	Tab Name	Group Name	Field Name	Instructions/Comments
				button is clicked. This dialog form is used to connect "User Contacts" to an ISR. It fills the table fields on the related ISR when the ISR is displayed or saved. Walk table logic is used to store the data on the ISR. When drop down button next to the name field is clicked, a name is highlighted and clicked 'O.K', then that name will be displayed on the Name field. When name is displayed in the name field and the 'Add' button is clicked' then the name will be added to the 'List of Personnel' table. When a name in 'List of Personnel' field is double clicked, it is displayed in the name field. When 'Remove' button is clicked, the name will be deleted from the 'List of Personnel' table. (1c)
28	ISR Details	Create ISR	Claim Status	A value is selected to modify this field. The Claim Status field is a Selection field. Selection is *'No Action'*, *'Mass Adjustment'*, *'Recycle'*, *'Resubmit'*. Claim Status may only be modified when the claim status is *'New – Draft'*.
29	ISR Details		Payment Correction	Displays data from the 'Payment Correction' field from Over/UnderPayment screen.
30	ISR Details		'Over/Under' Button	Click on the 'Over/Under' button in which a FCM:OverUnderPayment screen appears. (1d)
31		Over/Under Payment	ISR Number	Displays the ISR Number.
32		Over/Under Payment	Payment Correction	Three options are available. Click on drop down button and select "Overpayment", "Underpayment" or "(clear)". 'Payment Correction' is a

#	Tab Name	Group Name	Field Name	Instructions/Comments
				selection field.
33		Over/Under Payment	Date Identified	Select a date from the calendar editor or type a value to modify this field. Date Identified is a TimeStamp field. MM/DD/CCYY
34		Over/Under Payment	Method_of_Resolution	Any amount of letters, numbers, symbols or keyword can be typed to modify Impact if Disapproved field. Method_of_Resolution can contain Unlimited characters. (DMAS CM Coordinator use only.) Carolyn to check.
35		Over/Under Payment	Date Resolved	Select a date from the calendar editor or type a value to modify this field. Date Resolved is a TimeStamp field. MM/DD/CCYY (DMAS CM Coordinator use only.)
36		Over/Under Payment		Click 'OK' to apply entries and exit. Click 'Cancel' to disregard entries and exit.



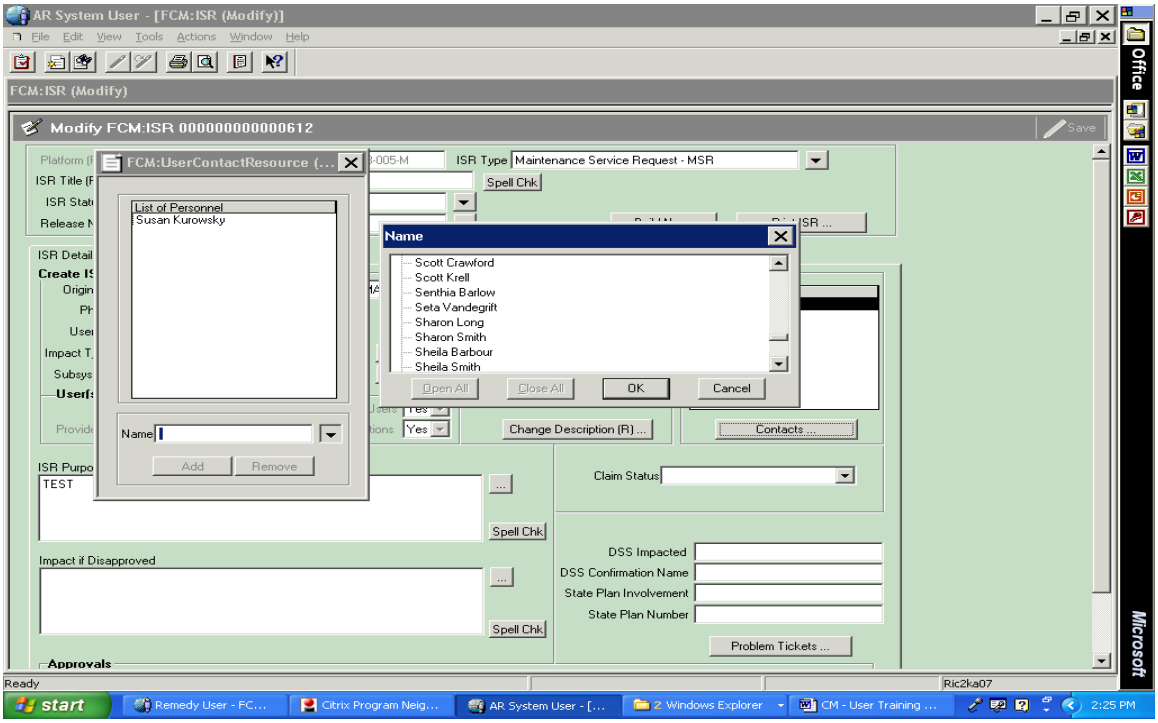
1a.

Note: Copy/paste functions can be used to copy information from upper box into lower box. This can be done as follows:

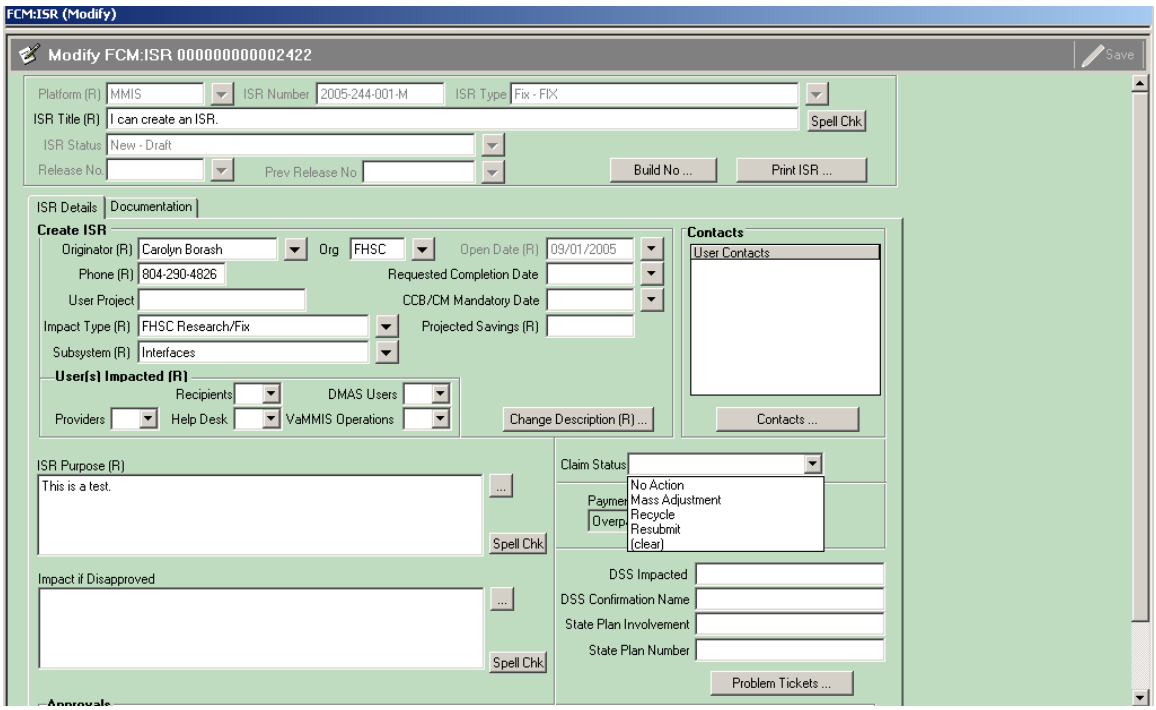
a. *Highlight the portion to be copied from upper box.*
b. *Right click in upper box and select 'Copy.*

c. *Place cursor in lower box.*
d. *Right click in lower box and select 'Paste'.*

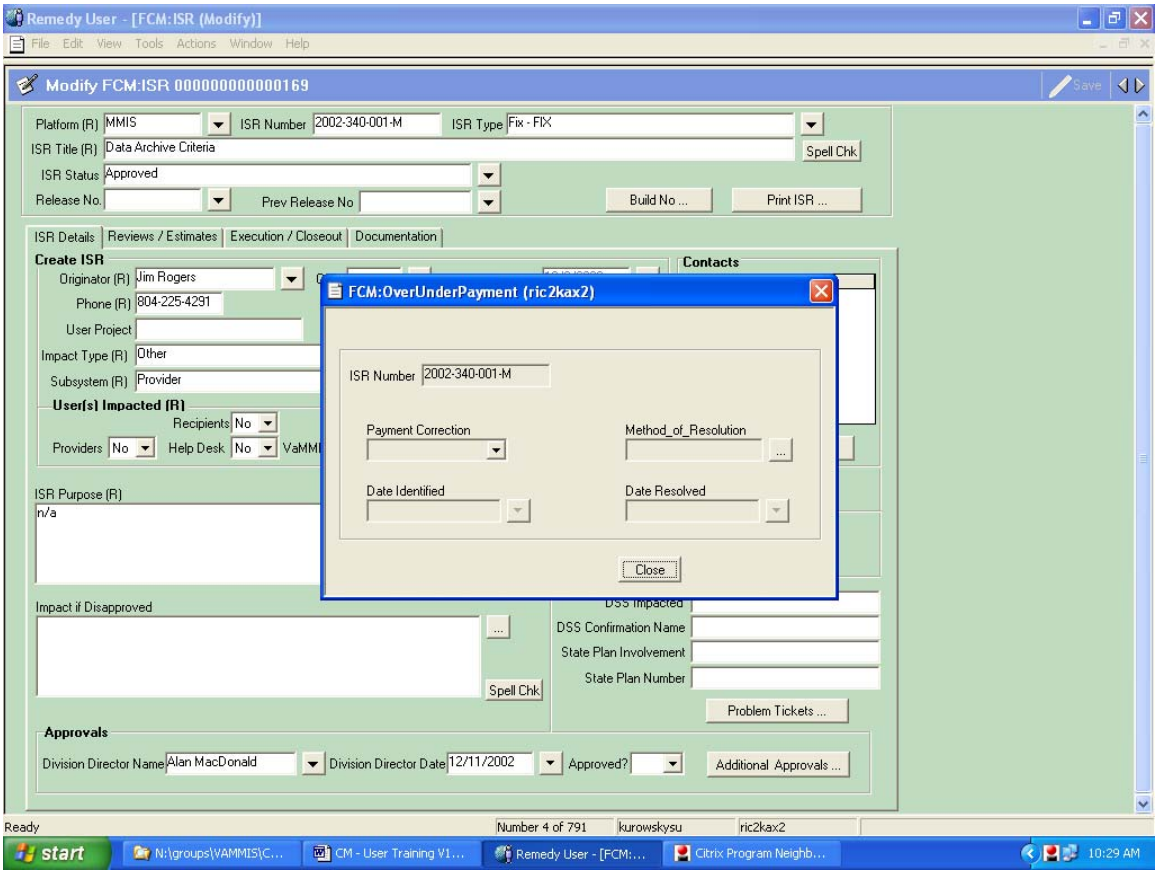
1b.



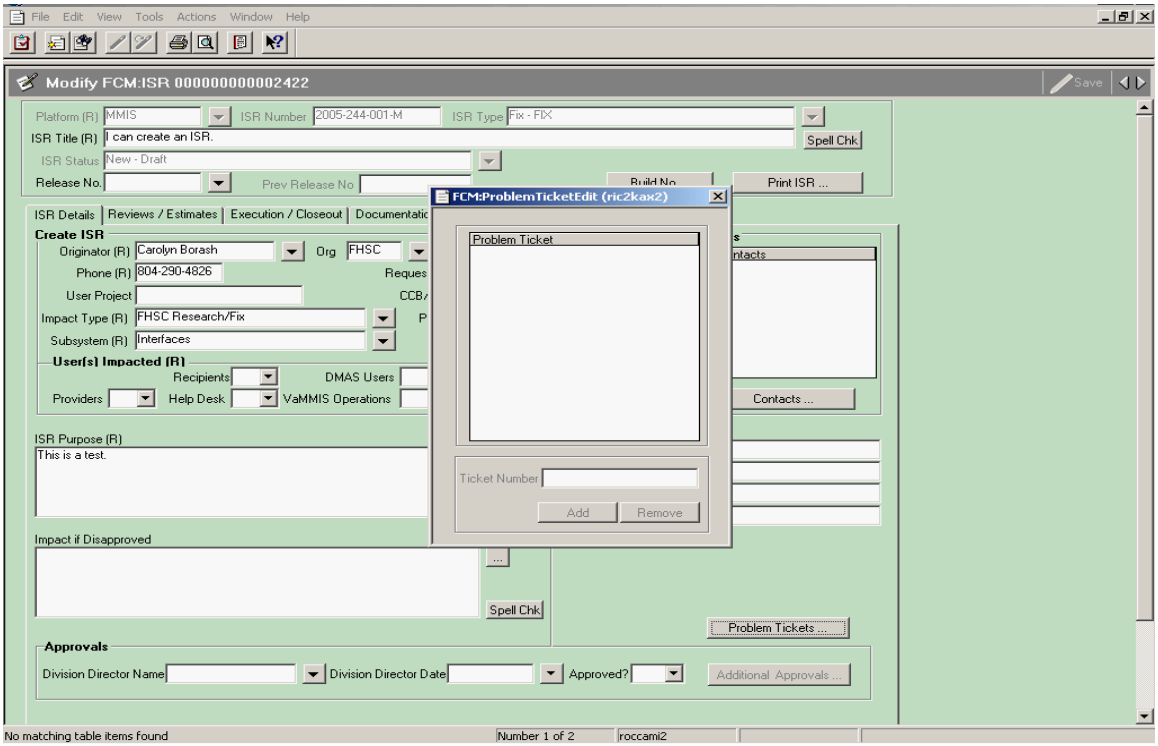
1c.



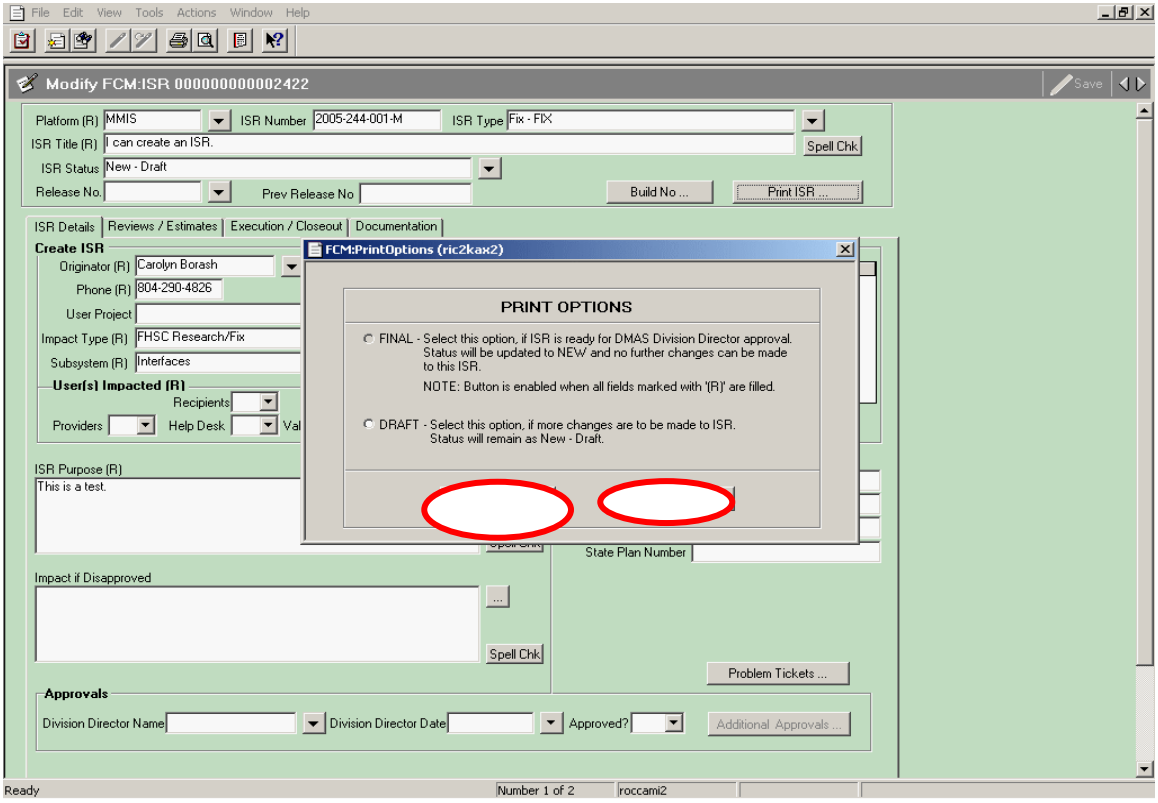
1d.

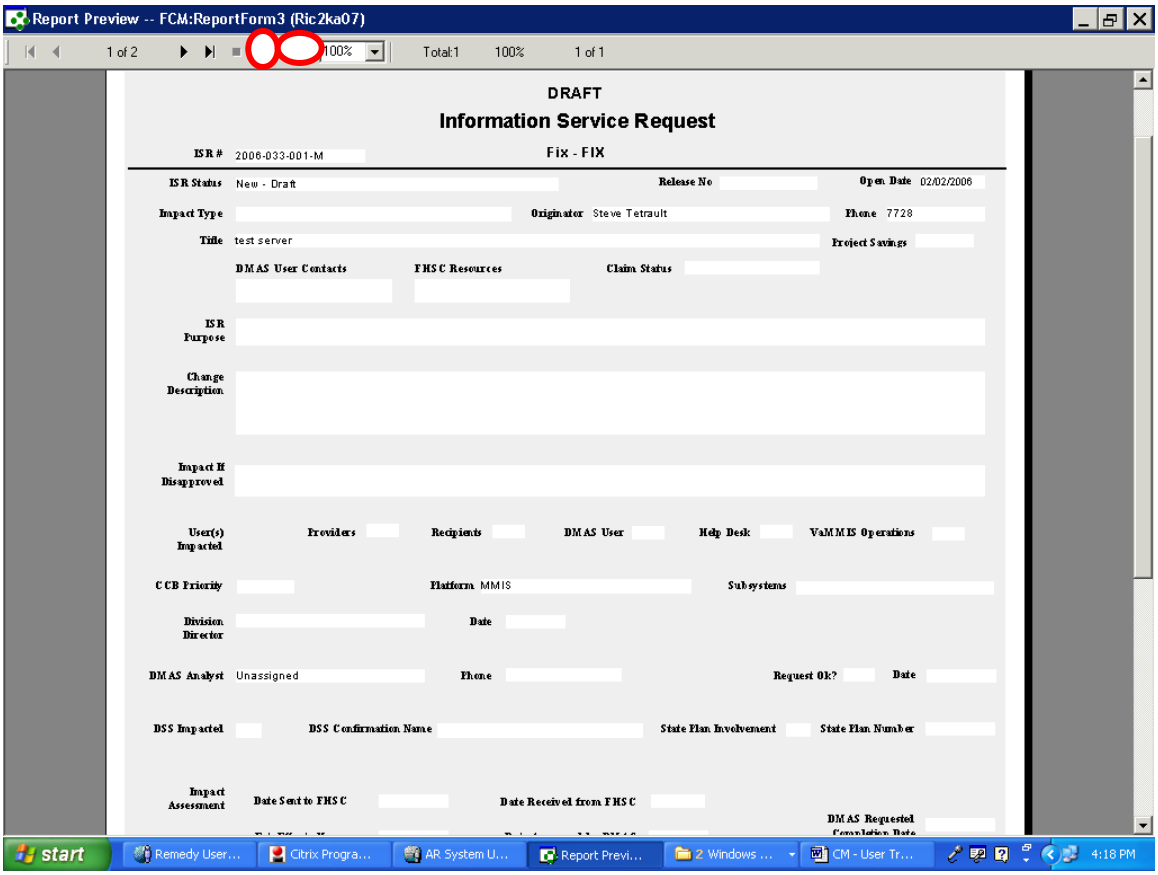

Remedy User - [FCM:ISR (Modify)]
File Edit View Tools Actions Window Help
Modify FCM:ISR 000000000000169
Save
Platform (R) MMIS
ISR Number 2002-340-001-M
ISR Type Fix - FIX
ISR Title (R) Data Archive Criteria
Spell Chk
ISR Status Approved
Release No.
Prev Release No
Build No ...
Print ISR ...
ISR Details
Reviews / Estimates
Execution / Closeout
Documentation
Create ISR
Originator (R) Jim Rogers
Phone (R) 804-225-4291
User Project
Impact Type (R) Other
Subsystem (R) Provider
User(s) Impacted (R)
Recipients No
Providers No
Help Desk No
Contacts
ISR Purpose (R)
n/a
Impact if Disapproved
Spell Chk
DSS Impacted
DSS Confirmation Name
State Plan Involvement
State Plan Number
Problem Tickets ...
Approvals
Division Director Name Alan MacDonald
Division Director Date 12/11/2002
Approved?
Additional Approvals ...
FCM:OverUnderPayment (ric2kax2)
ISR Number 2002-340-001-M
Payment Correction
Method_of_Resolution
Date Identified
Date Resolved
Close
Ready
Number 4 of 791
kurowskysu
ric2kax2
start
N:\groups\VAMMIS\C...
CM - User Training V1...
Remedy User - [FCM:...
Citrix Program Neighb...
10:29 AM

1e.


File Edit View Tools Actions Window Help
Modify FCM:ISR 000000000002422
Save
Platform (R) MMIS
ISR Number 2005-244-001-M
ISR Type Fix - FIX
ISR Title (R) I can create an ISR.
Spell Chk
ISR Status New - Draft
Release No.
Prev Release No
Build No ...
Print ISR ...
ISR Details
Reviews / Estimates
Execution / Closeout
Documentation
Create ISR
Originator (R) Carolyn Borash
Org FHSC
Phone (R) 804-290-4826
User Project
Impact Type (R) FHSC Research/Fix
Subsystem (R) Interfaces
User(s) Impacted (R)
Recipients
DMAS Users
Providers
Help Desk
VaMMIS Operations
Contacts ...
ISR Purpose (R)
This is a test.
Impact if Disapproved
Spell Chk
Problem Tickets ...
Approvals
Division Director Name
Division Director Date
Approved?
Additional Approvals ...
FCM:ProblemTicketEdit (ric2kax2)
Problem Ticket
Ticket Number
Add
Remove
No matching table items found
Number 1 of 2
roccami2

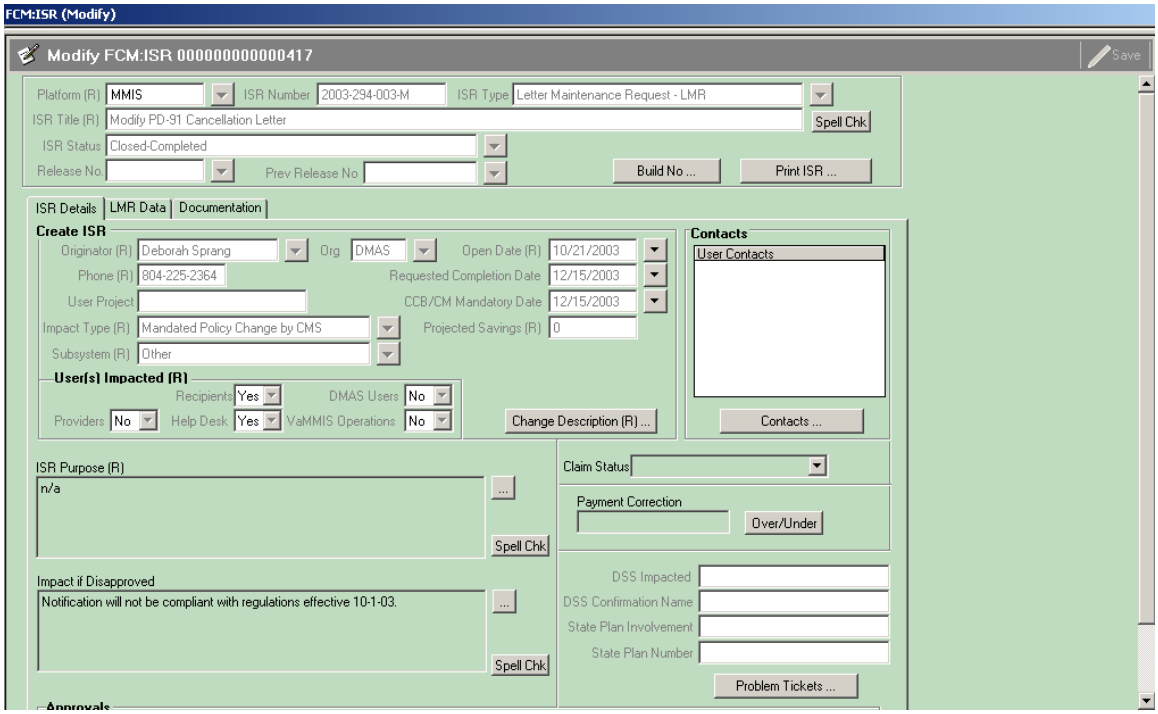
1f.


File Edit View Tools Actions Window Help
Modify FCM:ISR 000000000002422
Save
Platform (R) MMIS
ISR Number 2005-244-001-M
ISR Type Fix - FIX
ISR Title (R) I can create an ISR.
Spell Chk
ISR Status New - Draft
Release No.
Prev Release No
Build No ...
Print ISR ...
ISR Details
Reviews / Estimates
Execution / Closeout
Documentation
Create ISR
Originator (R) Carolyn Borash
Phone (R) 804-290-4826
User Project
Impact Type (R) FHSC Research/Fix
Subsystem (R) Interfaces
User(s) Impacted (R)
Recipients
Providers
Help Desk
ISR Purpose (R)
This is a test.
Impact if Disapproved
Spell Chk
State Plan Number
Problem Tickets ...
Approvals
Division Director Name
Division Director Date
Approved?
Additional Approvals ...
FCM:PrintOptions (ric2kax2)
PRINT OPTIONS
FINAL - Select this option, if ISR is ready for DMAS Division Director approval. Status will be updated to NEW and no further changes can be made to this ISR.
NOTE: Button is enabled when all fields marked with '(R)' are filled.
DRAFT - Select this option, if more changes are to be made to ISR. Status will remain as New - Draft.
Ready
Number 1 of 2
roccami2

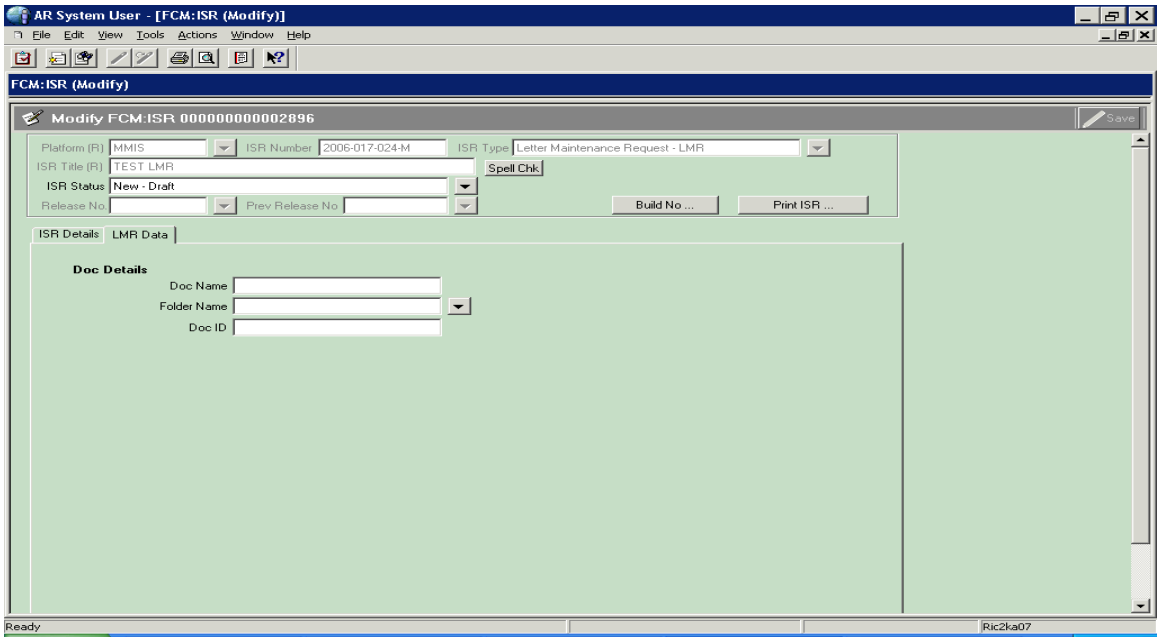

Report Preview -- FCM:ReportForm3 (Ric2ka07)
1 of 2
100%
Total:1
100%
1 of 1
DRAFT
Information Service Request
ISR # 2006-033-001-M
Fix - FIX
ISR Status New - Draft
Release No
Open Date 02/02/2006
Impact Type
Originator Steve Tetrault
Phone 7728
Title test server
Project Savings
DMAS User Contacts
FHSC Resources
Claim Status
ISR Purpose
Change Description
Impact If Disapproved
User(s) Impacted
Providers
Recipients
DMAS User
Help Desk
VaMMIS Operations
CCB Priority
Platform MMIS
Subsystems
Division Director
Date
DMAS Analyst Unassigned
Phone
Request Ok?
Date
DSS Impacted
DSS Confirmation Name
State Plan Involvement
State Plan Number
Impact Assessment
Date Sent to FHSC
Date Received from FHSC
DMAS Requested
start
Remedy User...
Citrix Progra...
AR System U...
Report Previ...
2 Windows ...
CM - User Tr...
4:18 PM

Regular ISR Form (LMR version)

Note: Refer to ISR details section for description of fields for base form.



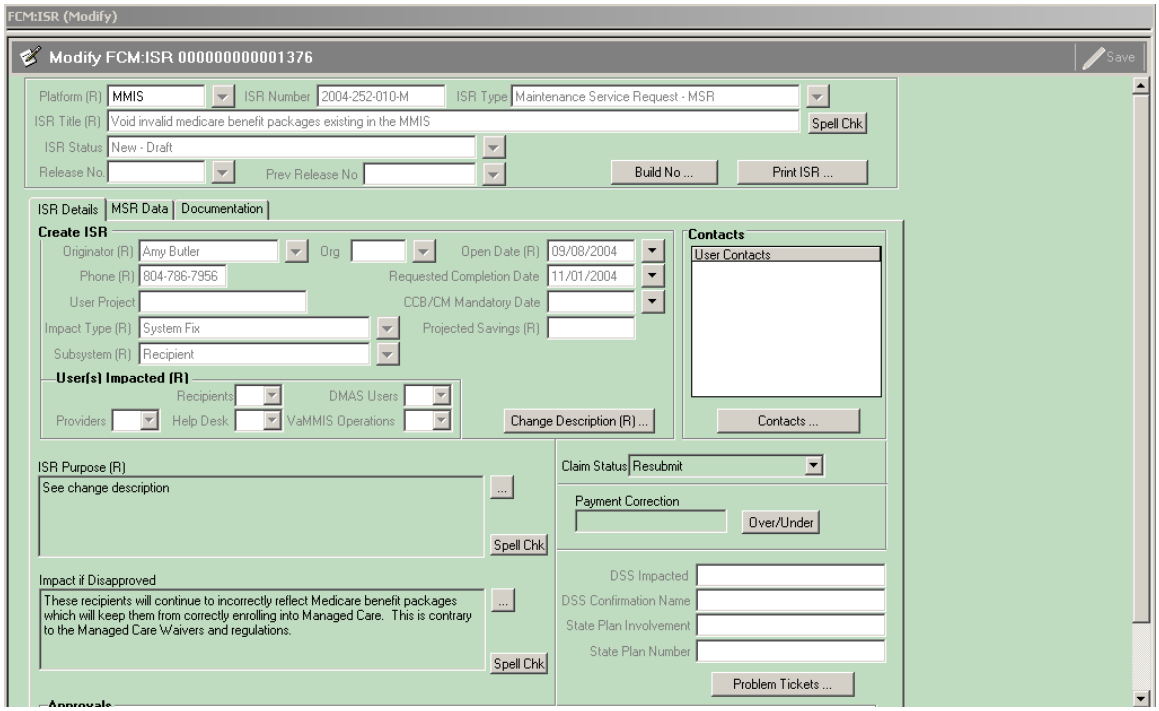
Second tab for 'LMR' version only.



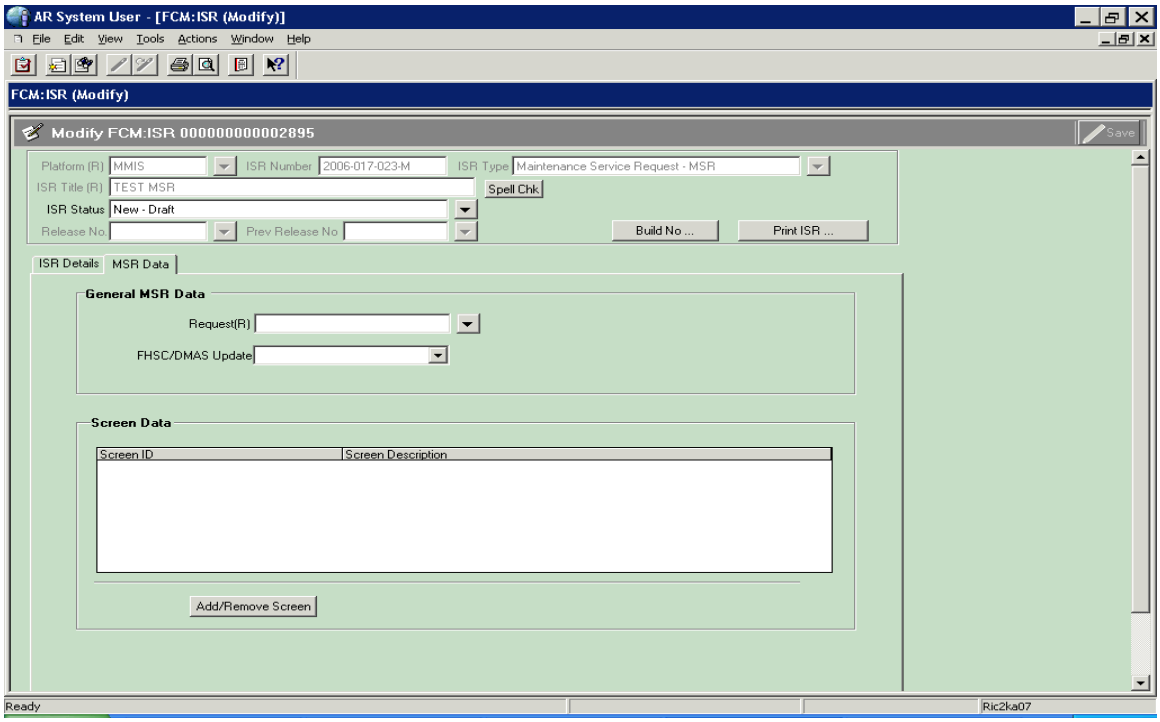
#	Tab Name	Group Name	Field Name	Instructions/Comments
1	LMR Data	Doc Details	Doc Name	Any letters, numbers, symbols or keywords can be accepted. Doc Name field is 69 characters. Field is applicable and visible for ISR Type of 'LMR' only.
2	LMR Data	Doc Details	Folder Name	Any letters, numbers, symbols or keywords can be accepted or a selection can be accepted. Folder Name field is 69 characters. Selection types include: 'Claims', 'EPSDT', 'Finance' or 'Recipient'. Folder Name is applicable and visible for ISR Type of 'LMR' only.
3	LMR Data	Doc Details	Doc ID	Any letters, numbers, symbols or keywords can be accepted. Doc ID field is 69 characters. Field is applicable and visible for ISR Type of 'LMR' only.

Regular ISR Form (MSR version)

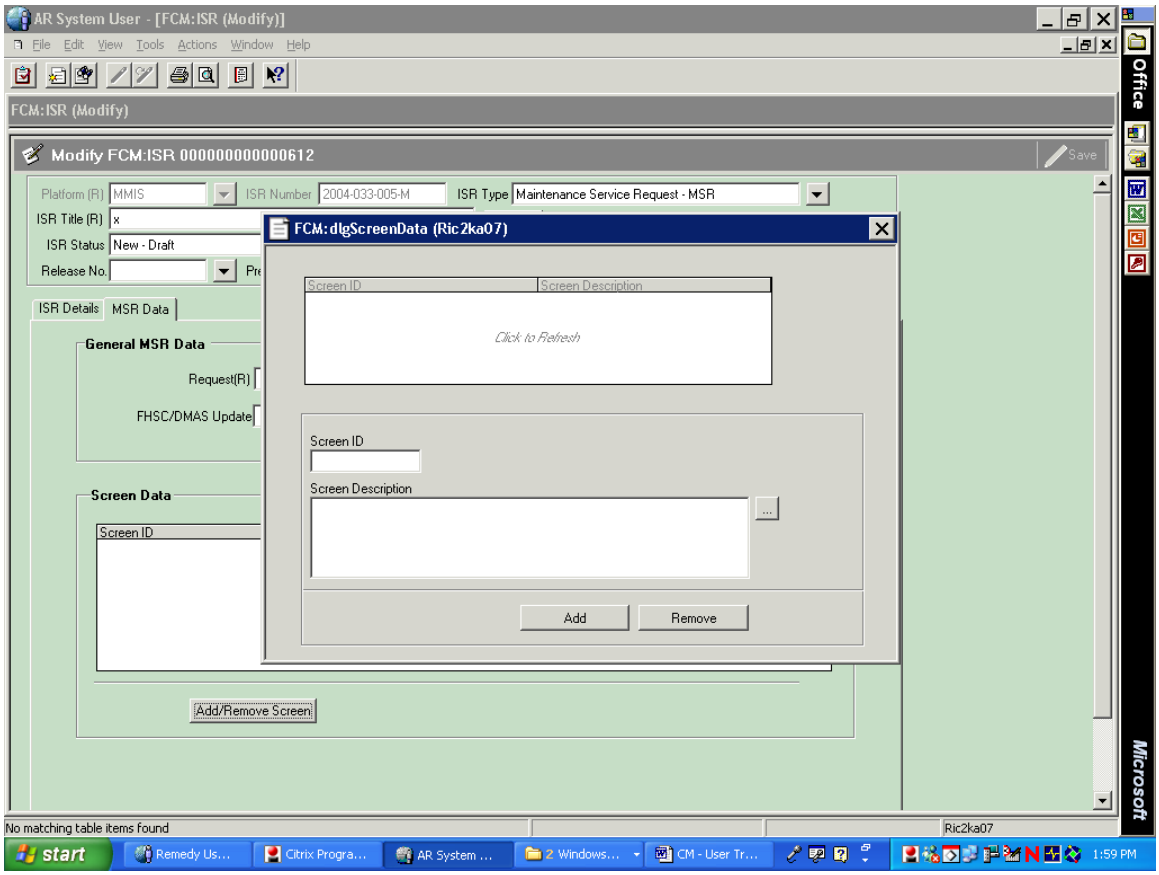
Note: Refer to ISR details section for description of fields.



Second tab for 'MSR' version only.



#	Tab Name	Group Name	Field Name	Instructions/Comments
1	MSR Data	General MSR Data	Request (R)	Any letters, numbers, symbols or keywords can be accepted or a selection can be accepted. Request (R) field is 50 characters. Field is applicable and visible for ISR Type of 'MSR' only. Selection types include: 'Batch', 'Edit', 'Other', 'Provider Codes affect Pricing', 'Rates', 'Recipient Codes affect Pricing', 'Tables' and 'Value Sets'.
2	MSR Data	General MSR Data	FHSC/DMAS Update	A value is selected to modify this field. The FHSC/DMAS Update field is a Selection field. Field is applicable and visible for ISR Type of 'MSR' only. Selection types include: 'FHSC', 'DMAS' and '(clear)'.



#	Tab Name	Group Name	Field Name	Instructions/Comments
1	-	Screen Data	Screen ID	Any number, letter, symbol or keyword can be accepted. Screen ID field is a character field and can ***contain up to 20 characters***. When 'Add' is clicked, data will be added to 'Screen ID' list on the. FCM:dlgScreenData screen. When data is double clicked on the 'Screen ID' list, the 'Remove' button is enabled. When 'Remove' button is clicked, data will be deleted from 'Screen ID' list on the FCM:dlgScreenData screen.
2	-	Screen Data	Screen Description	Any number, letter, symbol or keyword can be accepted. Screen Description field is a character field and ***can contain unlimited characters***. When 'Add' is clicked, data will be added to 'Screen Description' list on the. FCM:dlgScreenData screen. When data is double clicked on the 'Screen

#	Tab Name	Group Name	Field Name	Instructions/Comments
				Description' list, the 'Remove' button is enabled. When 'Remove' button is clicked, data will be deleted from 'Screen Description' list on the FCM:dlgScreenData screen.

ISR Type 'ADH' Only

- Field name having an '(R)' following it indicates a required field when creating an ISR. These fields will be checked to ensure a value is entered before the ISR is considered to be complete and ready for approval by Division Director.
- 'ISR Status' can have the following values:

  - **New-Draft**: Initial setting when ISR is being created.

  - **New**: ISR has been created with all required fields and 'Print ISR – Final' is selected which means it is ready for the approval of Division Director.

  - **Ready-Division Director Approved**: Set when Division Director related 'Approved?' field is set to 'Yes'. This indicates that the Division Director has approved the ISR.

  - **Approved**: Set when 'CCB/CM Approval' field is entered. This indicates the approval of ISR by CM Manager.

  - **In-Progress**: Set when FHS 'Date Received' field is entered and indicates the start of work on ISR by FHS.

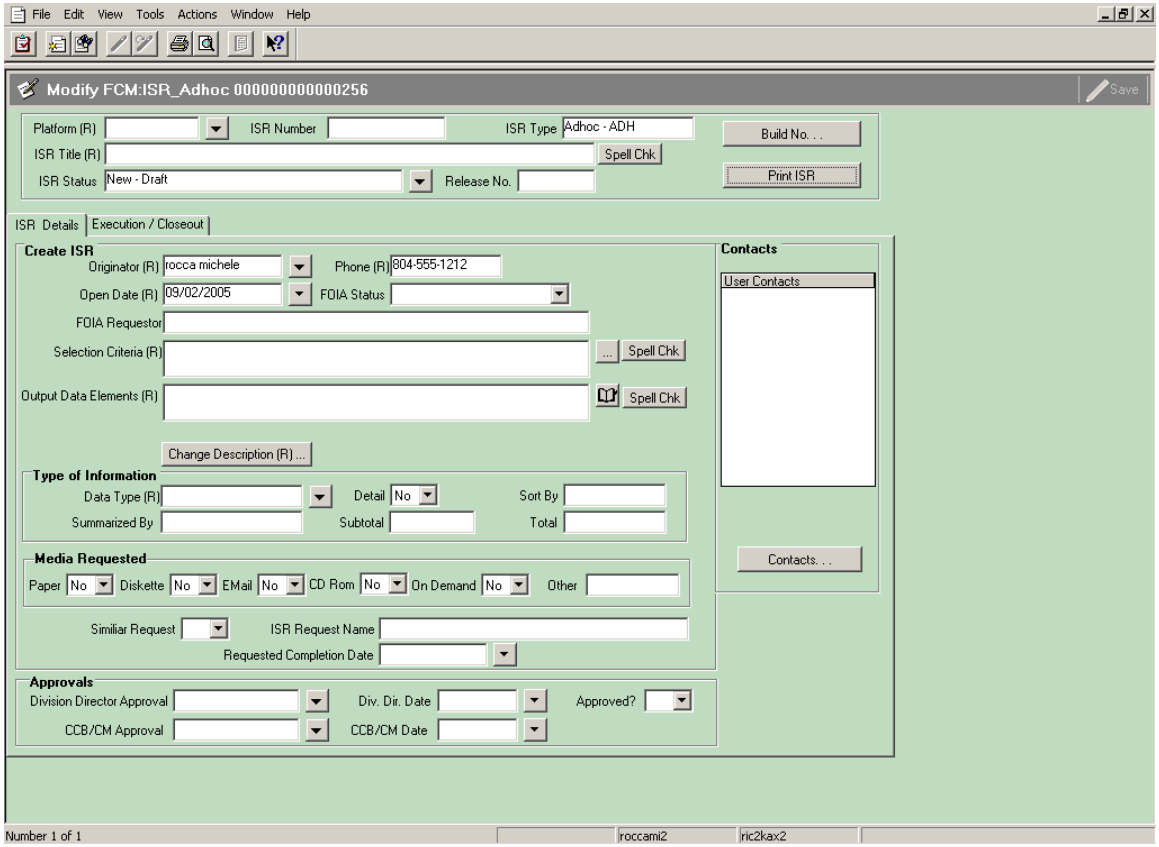
  - **Closed-Complete**: Set when 'Close Date' field is entered and indicates the verification/acceptance of all deliverables.

  - **Closed-Cancelled**: Set when Division Direction related 'Approved?' field is set to 'No' or 'CCB/CM Disapproval Date' field is entered. This indicates the disapproval and cancellation of an ISR by Division Director, CM Manager, CM Coordinator, or CCB (DMAS).

  - **Deferred**: Set when 'CCB/CM On Hold Date' field is entered. This indicates the deferring of an ISR.

ISR Type 'ADH' uses the Adhoc ISR Form and the screen layout is shown below.

Adhoc ISR Form



- Information on the fields related to the 'Create ISR' function is shown in the table following the screen display.

Note: Initial requirement is to have the 'Platform' and 'ISR Title' fields entered and saved in order for the fields on the 'ISR Details' tab to be enabled.

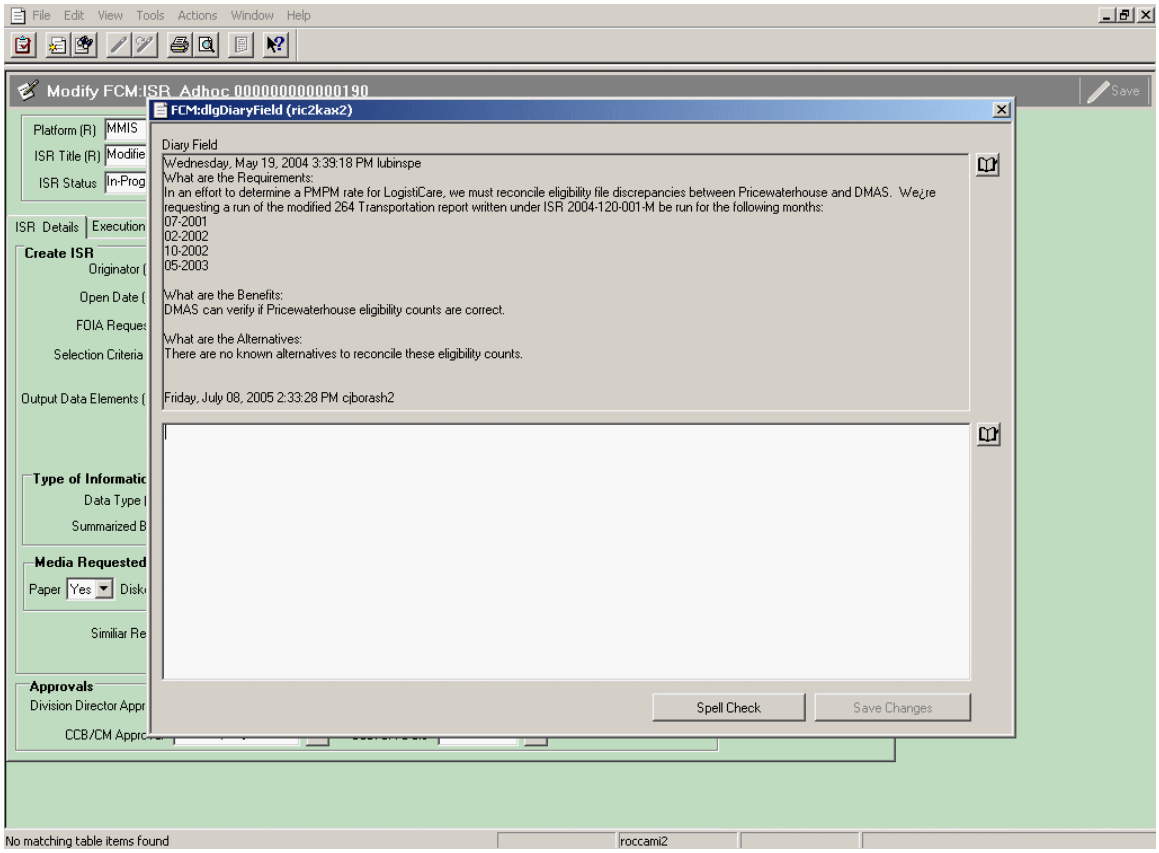
#	Tab Name	Group Name	Field Name	Instructions/Comments
1	-	-	Platform (R)	The Platform (R) is a selection field. Select values from drop-down list are: 'MMIS', 'IRP' or 'Other'.
2	-	-	ISR Number	System generated after 'Platform' has been selected and entry of 'ISR Title' information has been saved. CCYY-999-001-X CCYY – Year 999 – Julian Date 001 – Sequence number X – Platform (M – MMIS, I – IRP or O – Other) of the creation date.
3	-	-	ISR Type	System generated after ISR Type is selected on earlier screen. Exception: Field is enabled for ISR Type 'Unknown – UNK'. This has to be changed to one of the other ISR Types before it is considered to be ready for approval by DMAS Division Director by selecting 'final' or selecting 'draft' on Print screen.
4	-	-	ISR Title (R)	Any letters, numbers, symbols or keywords can be accepted. The ISR Title (R) field is 69 characters.
5	-	-	Release No.	Not Applicable
6	-	-	Build No.	Not Applicable
7	-	-	ISR Status	System generated according to the progress of the ISR on the defined ISR process. Details of settings for 'ISR Status' can be found above the screen display.
8	ISR Details	Create ISR	Originator (R)	System generated name of DMAS Originator or FHS Coordinator. Default: Name associated to user ID (part of application security setup). Additionally, type letters, numbers, symbols or keywords or choose an option from the FCM:MNU:Personnel menu to modify this field. Originator (R) is a

#	Tab Name	Group Name	Field Name	Instructions/Comments
				character field and can contain up to 50 characters.
9	ISR Details	Create ISR	Phone (R)	Phone number can be accepted or pulled from FCM:Personnel. The Phone (R) field can contain 15 characters.
10	ISR Details	Create ISR	Open Date (R)	System generated date. MM/DD/CCYY Note: Date is the date the ISR was created and cannot be modified.
11	ISR Details	Create ISR	FOIA Status	A value is selected to modify this field. FOIA Status is a Selection field Selection types are: 'Cost Est. Requested', 'Cost Est. Awaiting Approval', 'Cost Est. Received', 'Cost Est. Approved', 'Cost Est. Disapproved' and '(clear)'.
12	ISR Details	Create ISR	FOIA Requestor	Type letters, numbers, symbols or keywords. FOIA Requestor is a character field and can contain up to 50 characters.
13	ISR Details	Create ISR	Selection Criteria (R)	Type letters, numbers, symbols or keywords. Selection Criteria (R) is a character field and can be unlimited.
14	ISR Details	Create ISR	Output Data Elements (R)	Type letters, numbers, symbols or keywords. Output Data Elements (R) is a character field and can be unlimited.
15	ISR Details	Create ISR	Change Description (R)	When the Change Description (R) Control button is clicked, the screen shown below (1a) at end of this table is displayed. This shows the previous entry of the Change Description in upper box and a new entry or modification can be made using the lower box. 'Change Description' is a diary field and can contain up to 32,000 characters. Note: Saving a 'Change Description' entered in the lower box replaces all entries shown in the upper box. A warning popup will appear when saving the change to prevent any inadvertent replacements. 'Yes' will replace any entry. 'No' and clicking the 'X', will add the entry to the list of other entries.

#	Tab Name	Group Name	Field Name	Instructions/Comments
16	ISR Details	-	Contacts	FCM:UserContactResources screen shown below (1b) is displayed when 'Contacts' button is clicked. This dialog form is used to connect "User Contacts" to an ISR. It fills the table fields on the related ISR when the ISR is displayed or saved. Walk table logic is used to store the data on the ISR. When drop down button next to the name field is clicked, a name is highlighted and clicked 'O.K', then that name will be displayed on the Name field. When name is displayed in the name field and the 'Add' button is clicked' then the name will be added to the 'List of Personnel' table. When a name in 'List of Personnel' field is double clicked, it is displayed in the name field. When 'Remove' button is clicked, the name will be deleted from the 'List of Personnel' table. (1c)
17	ISR Details	Type of Information	Data Type (R)	Data Type is a selection field. Selection type include: 'FAMIS', 'Medicaid' or 'Both'.
18	ISR Details	Type of Information	Detail	Detail is a selection field. Selection type include: 'Yes', 'No' or '(clear)'.
19	ISR Details	Type of Information	Sort By	Type letters, numbers, symbols or keywords. Sort By is a character field and can contain up to 25 characters.
20	ISR Details	Type of Information	Summarized By	Type letters, numbers, symbols or keywords. Summarized By is a character field and can contain up to 50 characters.
21	ISR Details	Type of Information	Sub Total	Type letters, numbers, symbols or keywords. Sub Total is a character field and can contain up to 20 characters.
22	ISR Details	Type of Information	Total	Type letters, numbers, symbols or keywords. Total is a character field and can contain up to 20 characters.
23	ISR Details	Media	Paper	Paper is a selection field.

#	Tab Name	Group Name	Field Name	Instructions/Comments
		Requested		Selection type include: 'Yes', 'No' or '(clear)'.
24	ISR Details	Media Requested	Diskette	Diskette is a selection field. Selection type include: 'Yes', 'No' or '(clear)'.
25	ISR Details	Media Requested	E Mail	E Mail is a selection field. Selection type include: 'Yes', 'No' or '(clear)'.
26	ISR Details	Media Requested	CD Rom	CD Rom is a selection field. Selection type include: 'Yes', 'No' or '(clear)'.
27	ISR Details	Media Requested	On Demand	On Demand is a selection field. Selection type include: 'Yes', 'No' or '(clear)'.
28	ISR Details	Media Requested	Other	Type letters, numbers, symbols or keywords. Summarized By is a character field and can contain up to 50 characters.
29	ISR Details	Create ISR	Similar Request	Similar Request is a selection field. Selection type include: 'Yes', 'No' or '(clear)'.
30	ISR Details	Create ISR	ISR Request Name	Type letters, numbers, symbols or keywords. Summarized By is a character field and can contain up to 55 characters.
31	ISR Details	Create ISR	Requested Completion Date	Select a date from the calendar editor or type a value to modify this field. Requested Completion Date is a TimeStamp field. MM/DD/CCYY Edit Check: Greater than Current Date.
32	ISR Details	-	Print ISR	Screen shown below (1d) is displayed when 'Print ISR' is clicked. Two options are available – 'Draft' (user can still update ISR) and 'Final' (if all required fields have been entered). Note: 'Final' sets the 'ISR Status' field to 'New' and would prevent any further changes from being made to the ISR by the user. Click 'Send to Printer' to print hard copy. Select 'View on Screen' to display soft copy. User can also print or save on local drive.

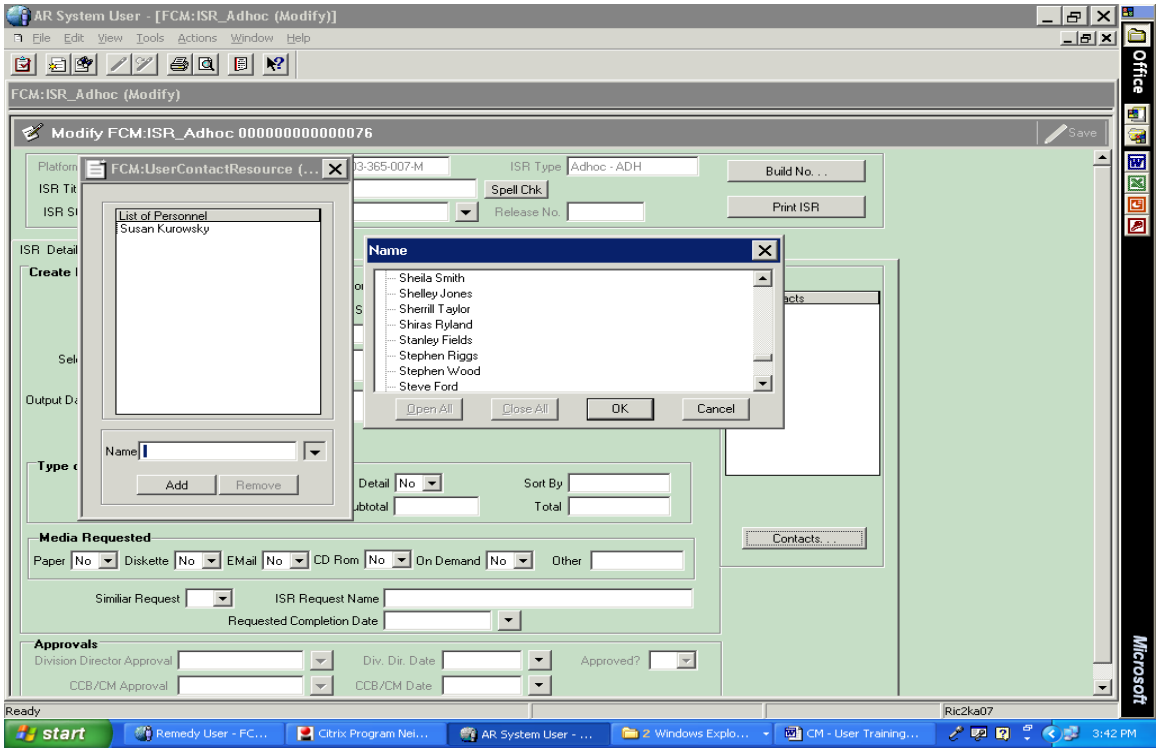
1a.



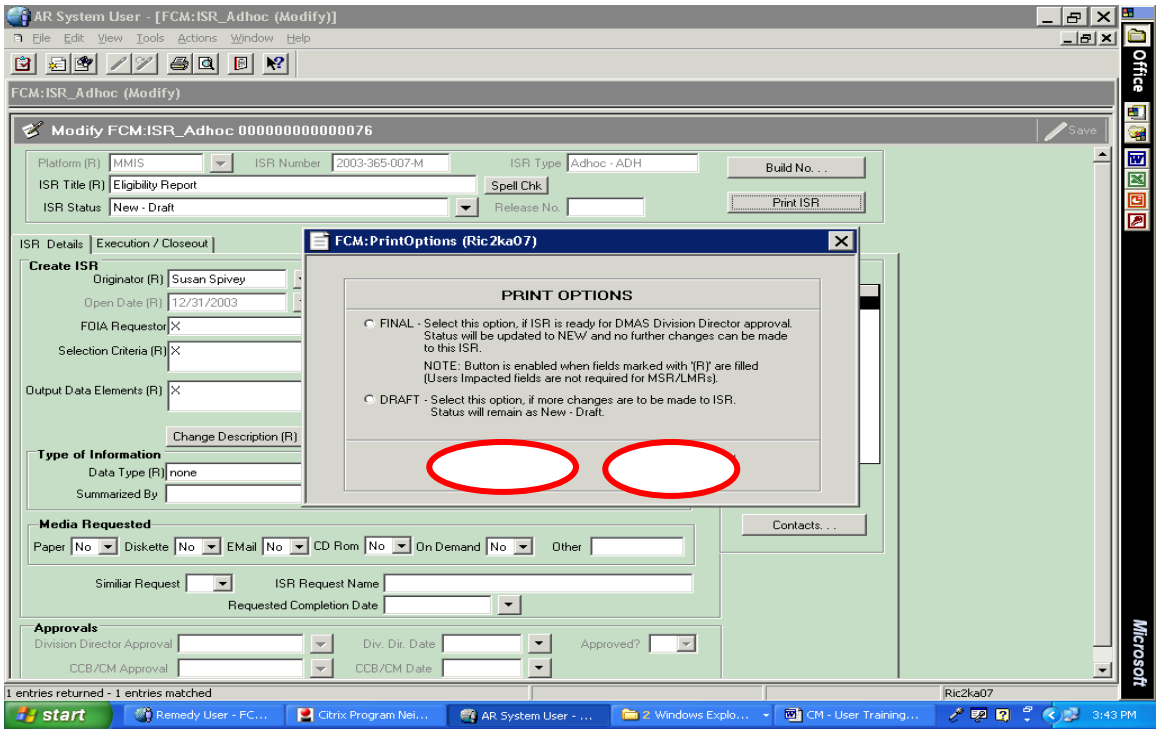
Note: Copy/paste functions can be used to copy information from upper box into lower box. This can be done as follows:

a. Highlight the portion to be copied from upper box.
b. Right click in upper box and select 'Copy.
c. Place cursor in lower box
d. Right click in lower box and select 'Paste'.

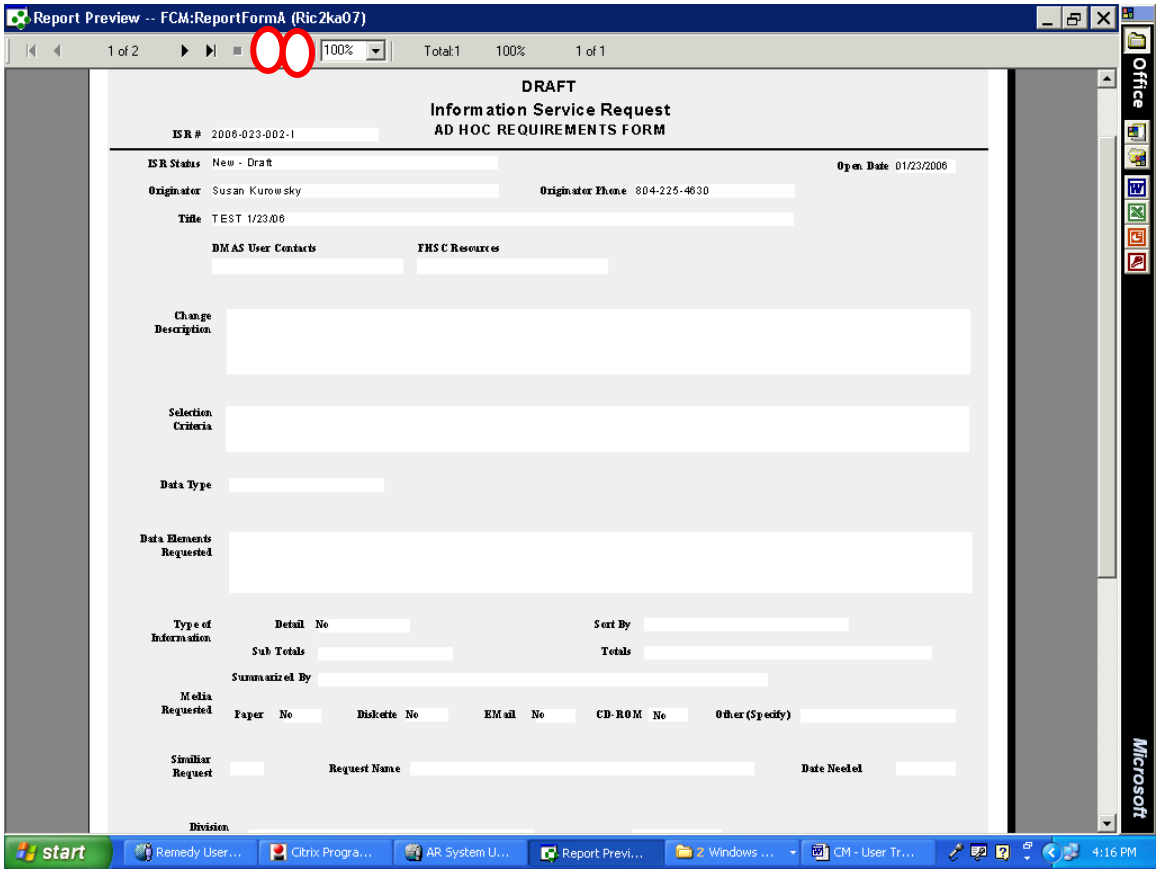
1b.


AR System User - [FCM:ISR_Adhoc (Modify)]
File Edit View Tools Actions Window Help
FCM:ISR_Adhoc (Modify)
Modify FCM:ISR_Adhoc 000000000000076
Save
FCM:UserContactResource (...
List of Personnel
Susan Kurowsky
Name
Add
Remove
Name
Sheila Smith
Shelley Jones
Sherrill Taylor
Shiras Ryland
Stanley Fields
Stephen Riggs
Stephen Wood
Steve Ford
Open All
Close All
OK
Cancel
ISR Type Adhoc - ADH
Build No. . .
Spell Chk
Release No.
Print ISR
Contacts. . .
Media Requested
Paper No Diskette No EMail No CD Rom No On Demand No Other
Similiar Request
ISR Request Name
Requested Completion Date
Approvals
Division Director Approval
Div. Dir. Date
Approved?
CCB/CM Approval
CCB/CM Date
Ready
Ric2ka07
start
Remedy User - FC...
Citrix Program Nei...
AR System User - ...
2 Windows Explo...
CM - User Training...
3:42 PM

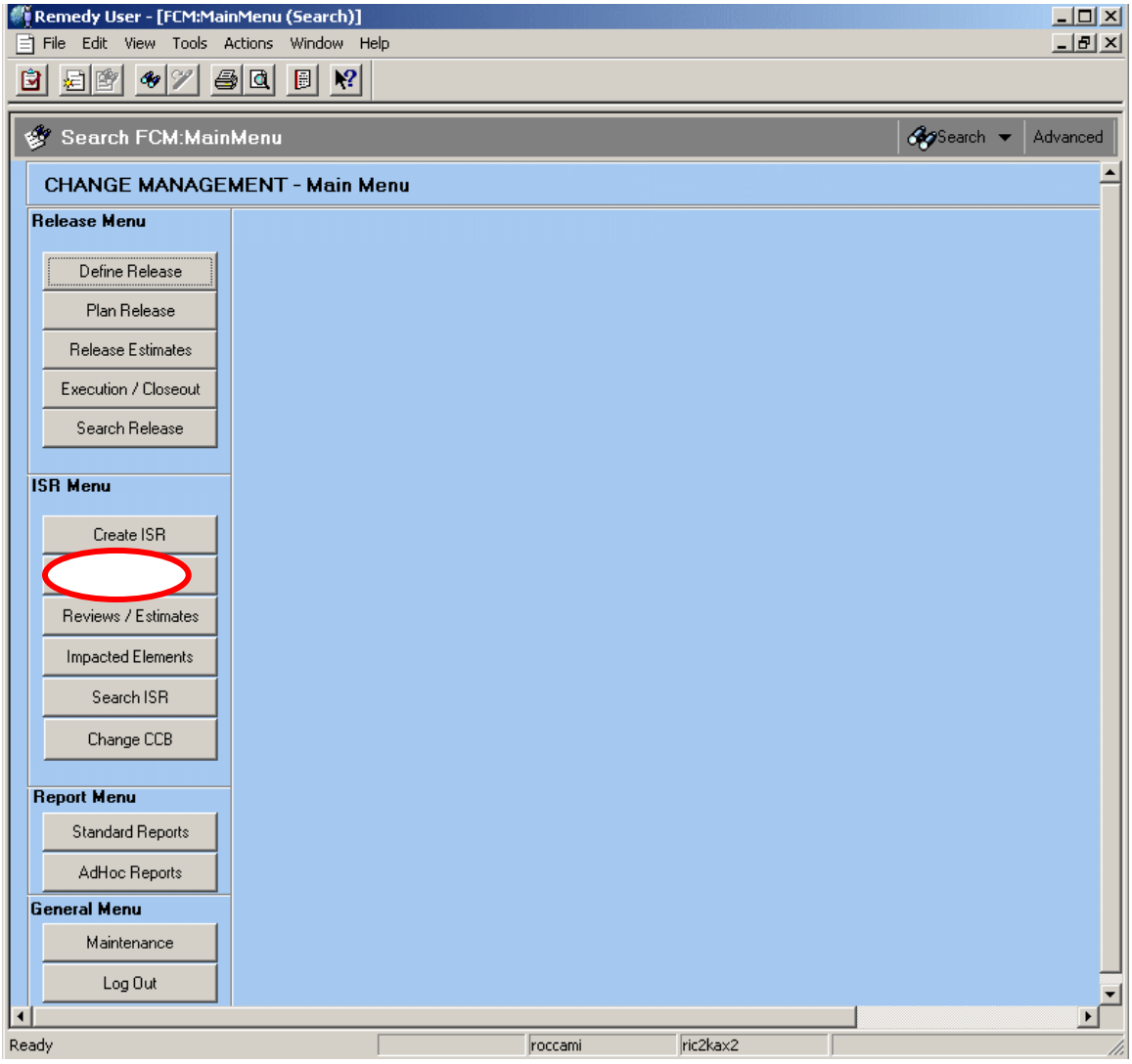
1c.


AR System User - [FCM:ISR_Adhoc (Modify)]
File Edit View Tools Actions Window Help
FCM:ISR_Adhoc (Modify)
Modify FCM:ISR_Adhoc 000000000000076
Save
Platform (R) MMIS
ISR Number 2003-365-007-M
ISR Type Adhoc - ADH
ISR Title (R) Eligibility Report
ISR Status New - Draft
Spell Chk
Release No.
Build No. . .
Print ISR
ISR Details
Execution / Closeout
Create ISR
Originator (R) Susan Spivey
Open Date (R) 12/31/2003
FOIA Requestor
Selection Criteria (R)
Output Data Elements (R)
Change Description (R)
Type of Information
Data Type (R) none
Summarized By
FCM:PrintOptions (Ric2ka07)
PRINT OPTIONS
FINAL - Select this option, if ISR is ready for DMAS Division Director approval. Status will be updated to NEW and no further changes can be made to this ISR.
NOTE: Button is enabled when fields marked with '(R)' are filled (Users Impacted fields are not required for MSR/LMRs).
DRAFT - Select this option, if more changes are to be made to ISR. Status will remain as New - Draft.
Contacts. . .
Media Requested
Paper No Diskette No EMail No CD Rom No On Demand No Other
Similiar Request
ISR Request Name
Requested Completion Date
Approvals
Division Director Approval
Div. Dir. Date
Approved?
CCB/CM Approval
CCB/CM Date
1 entries returned - 1 entries matched
Ric2ka07
start
Remedy User - FC...
Citrix Program Nei...
AR System User - ...
2 Windows Explo...
CM - User Training...
3:43 PM

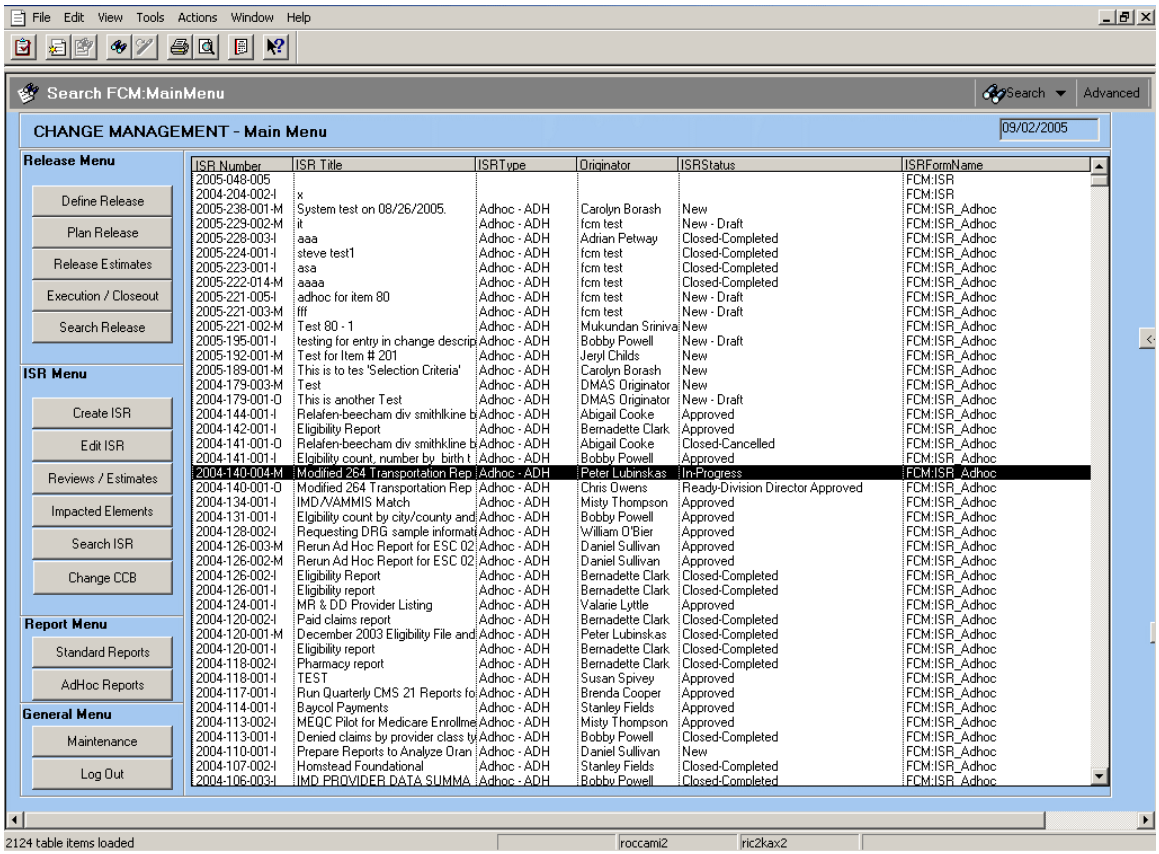
View on Screen



ISR Menu – 'Edit ISR'

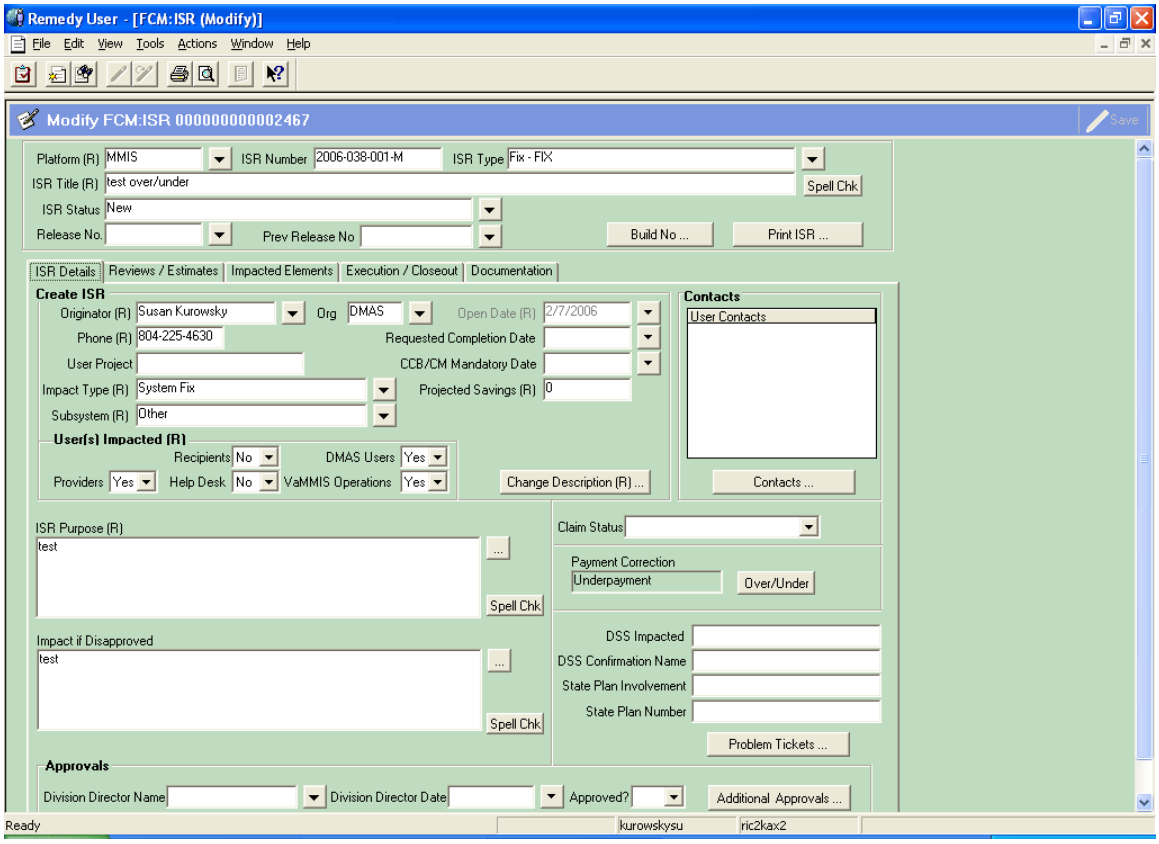


- 'Edit ISR' is a shortcut to the position at the 'ISR Details'. This is accessible and can be viewed by all users. Only DMAS CM Coordinator can update DMAS related information and only FHS CM Coordinator can update FHS information.
- Click on 'Edit ISR' option under 'ISR Menu' and the screen shown below is displayed.

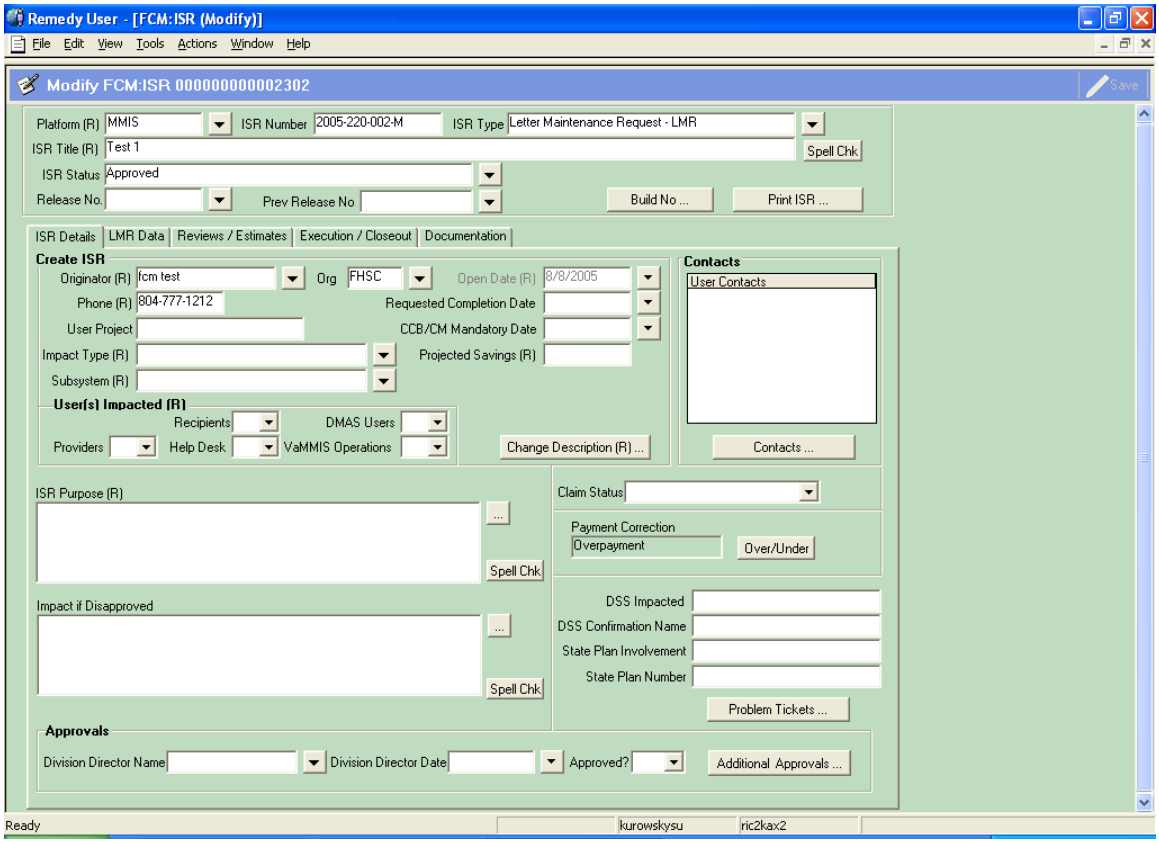


- List of available ISRs are shown. Double-click on the 'ISR Number' of interest to access the information for the ISR. Sample screens for Regular ISR, LMR, MSR and Adhoc are shown below.

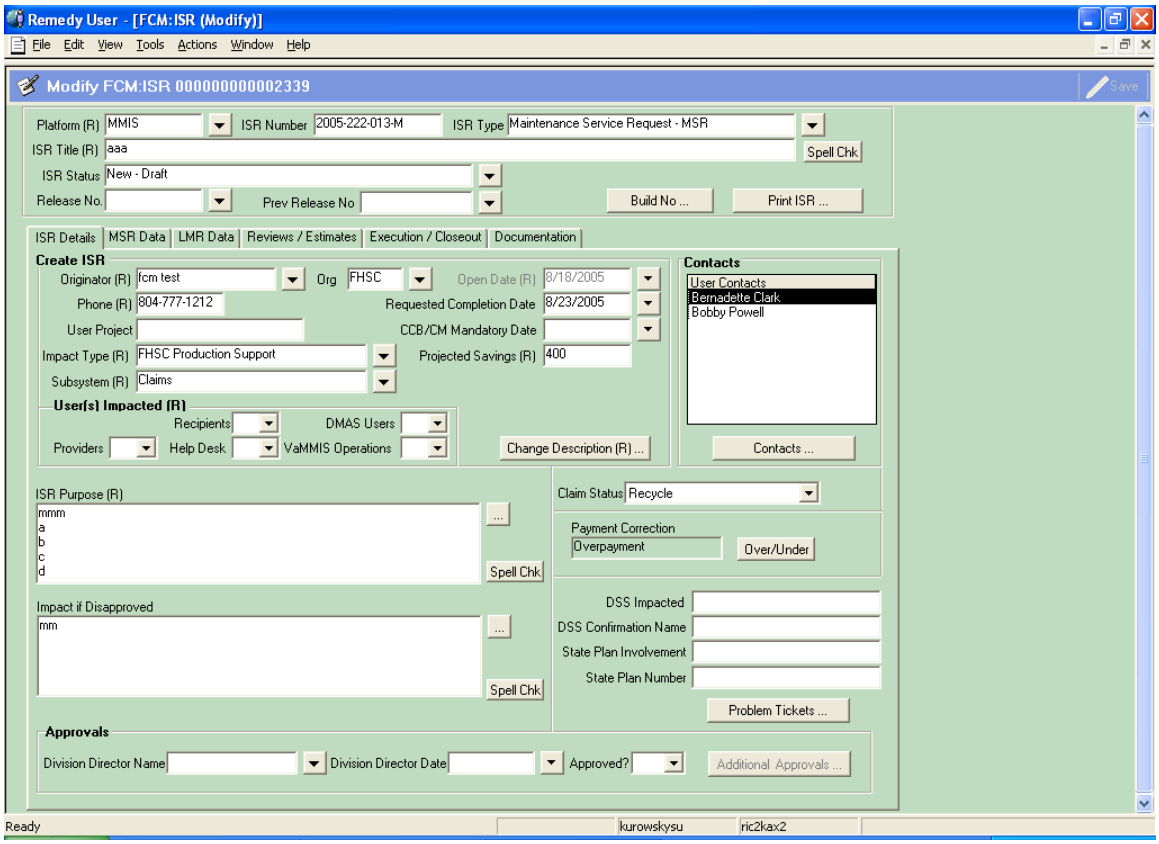
Regular ISR Form (Base version)



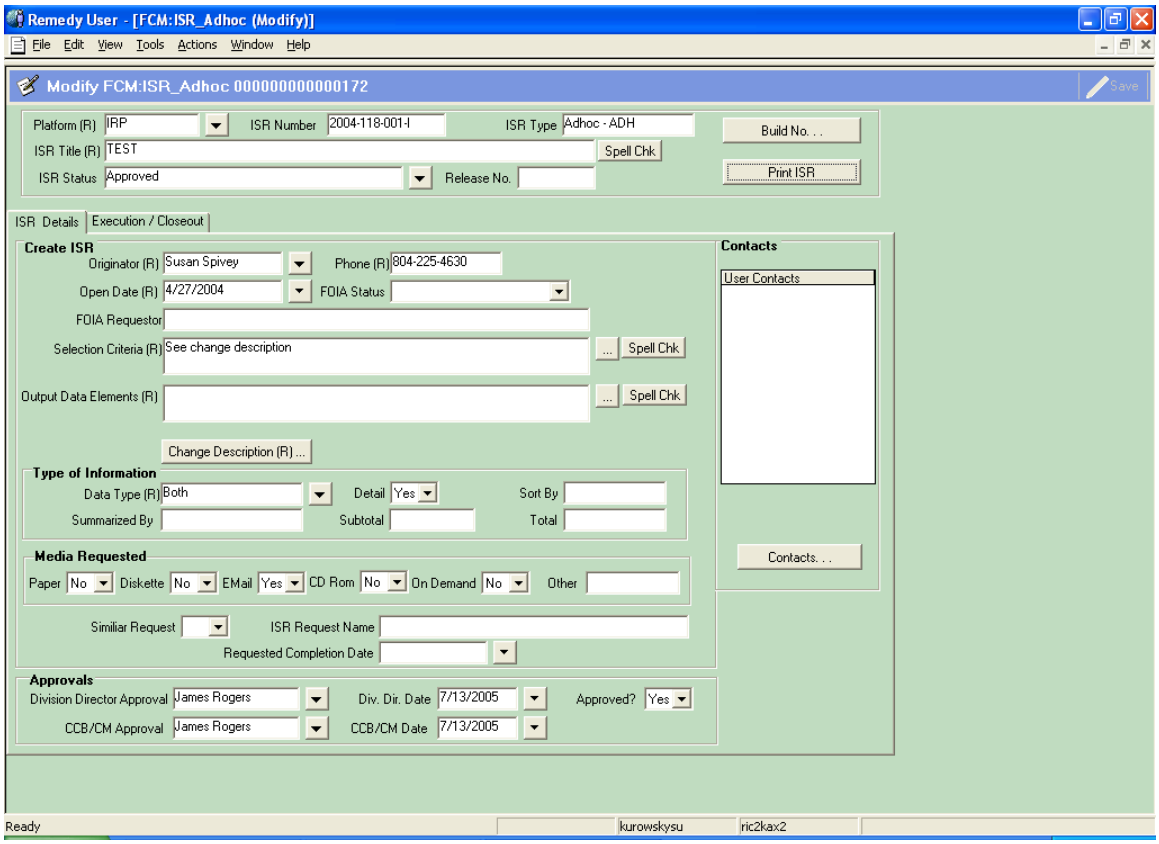
LMR Form


Remedy User - [FCM:ISR (Modify)]
File Edit View Tools Actions Window Help
Modify FCM:ISR 000000000002302
Save
Platform (R) MMIS
ISR Number 2005-220-002-M
ISR Type Letter Maintenance Request - LMR
ISR Title (R) Test 1
Spell Chk
ISR Status Approved
Release No.
Prev Release No
Build No ...
Print ISR ...
ISR Details
LMR Data
Reviews / Estimates
Execution / Closeout
Documentation
Create ISR
Originator (R) fcm test
Org FHSC
Open Date (R) 8/8/2005
Phone (R) 804-777-1212
Requested Completion Date
User Project
CCB/CM Mandatory Date
Impact Type (R)
Projected Savings (R)
Subsystem (R)
User(s) Impacted (R)
Recipients
DMAS Users
Providers
Help Desk
VaMMIS Operations
Change Description (R) ...
Contacts
User Contacts
Contacts ...
ISR Purpose (R)
Spell Chk
Impact if Disapproved
Spell Chk
Claim Status
Payment Correction
Overpayment
Over/Under
DSS Impacted
DSS Confirmation Name
State Plan Involvement
State Plan Number
Problem Tickets ...
Approvals
Division Director Name
Division Director Date
Approved?
Additional Approvals ...
Ready
kurowskysu
ric2kax2

MSR Form


Remedy User - [FCM:ISR (Modify)]
File Edit View Tools Actions Window Help
Modify FCM:ISR 000000000002339
Save
Platform (R) MMIS
ISR Number 2005-222-013-M
ISR Type Maintenance Service Request - MSR
ISR Title (R) aaa
Spell Chk
ISR Status New - Draft
Release No.
Prev Release No
Build No ...
Print ISR ...
ISR Details
MSR Data
LMR Data
Reviews / Estimates
Execution / Closeout
Documentation
Create ISR
Originator (R) fcm test
Org FHSC
Open Date (R) 8/18/2005
Phone (R) 804-777-1212
Requested Completion Date 8/23/2005
User Project
CCB/CM Mandatory Date
Impact Type (R) FHSC Production Support
Projected Savings (R) 400
Subsystem (R) Claims
User(s) Impacted (R)
Recipients
DMAS Users
Providers
Help Desk
VaMMIS Operations
Change Description (R) ...
Contacts
User Contacts
Bernadette Clark
Bobby Powell
Contacts ...
ISR Purpose (R)
mmm
a
b
c
d
Spell Chk
Claim Status Recycle
Payment Correction
Overpayment
Over/Under
Impact if Disapproved
mm
Spell Chk
DSS Impacted
DSS Confirmation Name
State Plan Involvement
State Plan Number
Problem Tickets ...
Approvals
Division Director Name
Division Director Date
Approved?
Additional Approvals ...
Ready
kurowskysu
ric2kax2

Adhoc Form


Remedy User - [FCM:ISR_Adhoc (Modify)]
File Edit View Tools Actions Window Help
Modify FCM:ISR_Adhoc 000000000000172
Save
Platform (R) IRP
ISR Number 2004-118-001-I
ISR Type Adhoc - ADH
Build No. . .
ISR Title (R) TEST
Spell Chk
ISR Status Approved
Release No.
Print ISR
ISR Details
Execution / Closeout
Create ISR
Originator (R) Susan Spivey
Phone (R) 804-225-4630
Open Date (R) 4/27/2004
FOIA Status
FOIA Requestor
Selection Criteria (R) See change description
Spell Chk
Output Data Elements (R)
Spell Chk
Change Description (R) ...
Contacts
User Contacts
Type of Information
Data Type (R) Both
Detail Yes
Sort By
Summarized By
Subtotal
Total
Media Requested
Paper No
Diskette No
EMail Yes
CD Rom No
On Demand No
Other
Contacts. . .
Similiar Request
ISR Request Name
Requested Completion Date
Approvals
Division Director Approval James Rogers
Div. Dir. Date 7/13/2005
Approved? Yes
CCB/CM Approval James Rogers
CCB/CM Date 7/13/2005
Ready
kurowskysu
ric2kax2

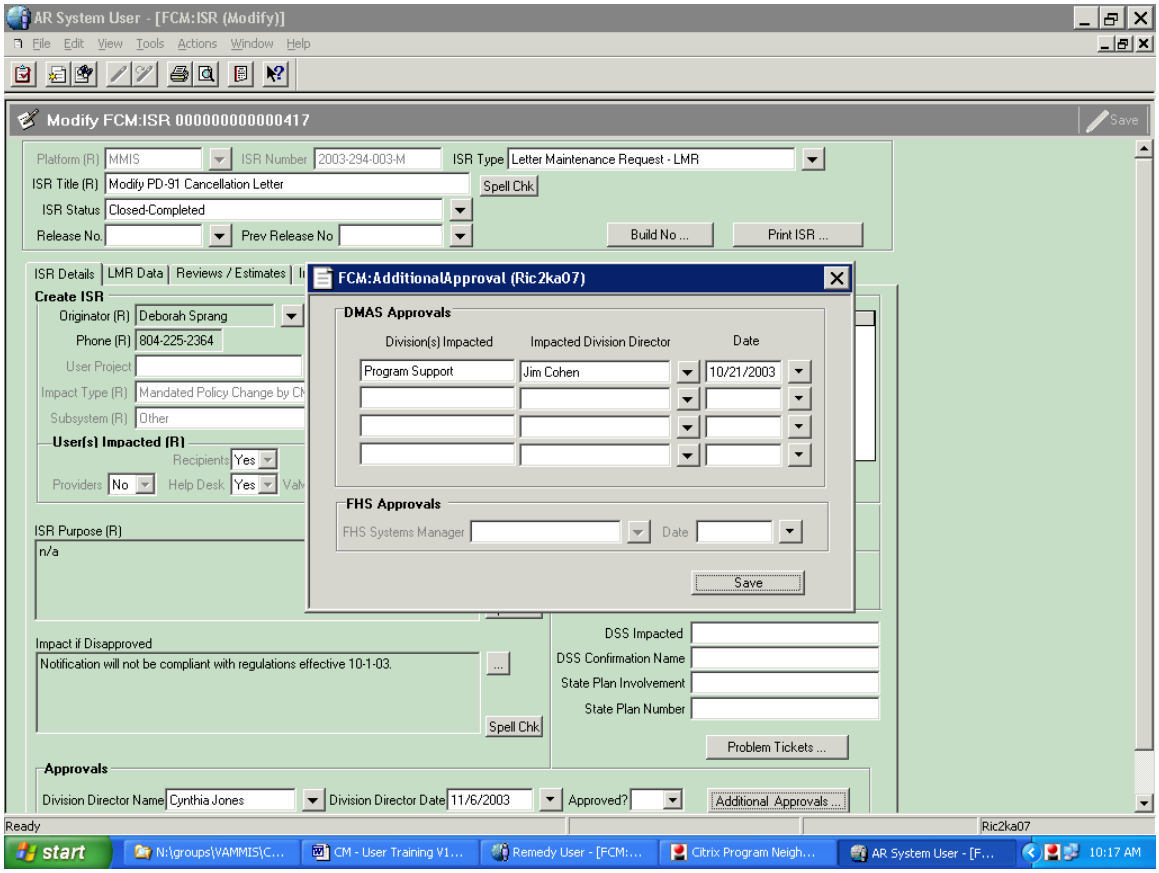
- Information on the fields related to the screens shown above is in the table.

Note: This is for DMAS CM Coordinator use only.

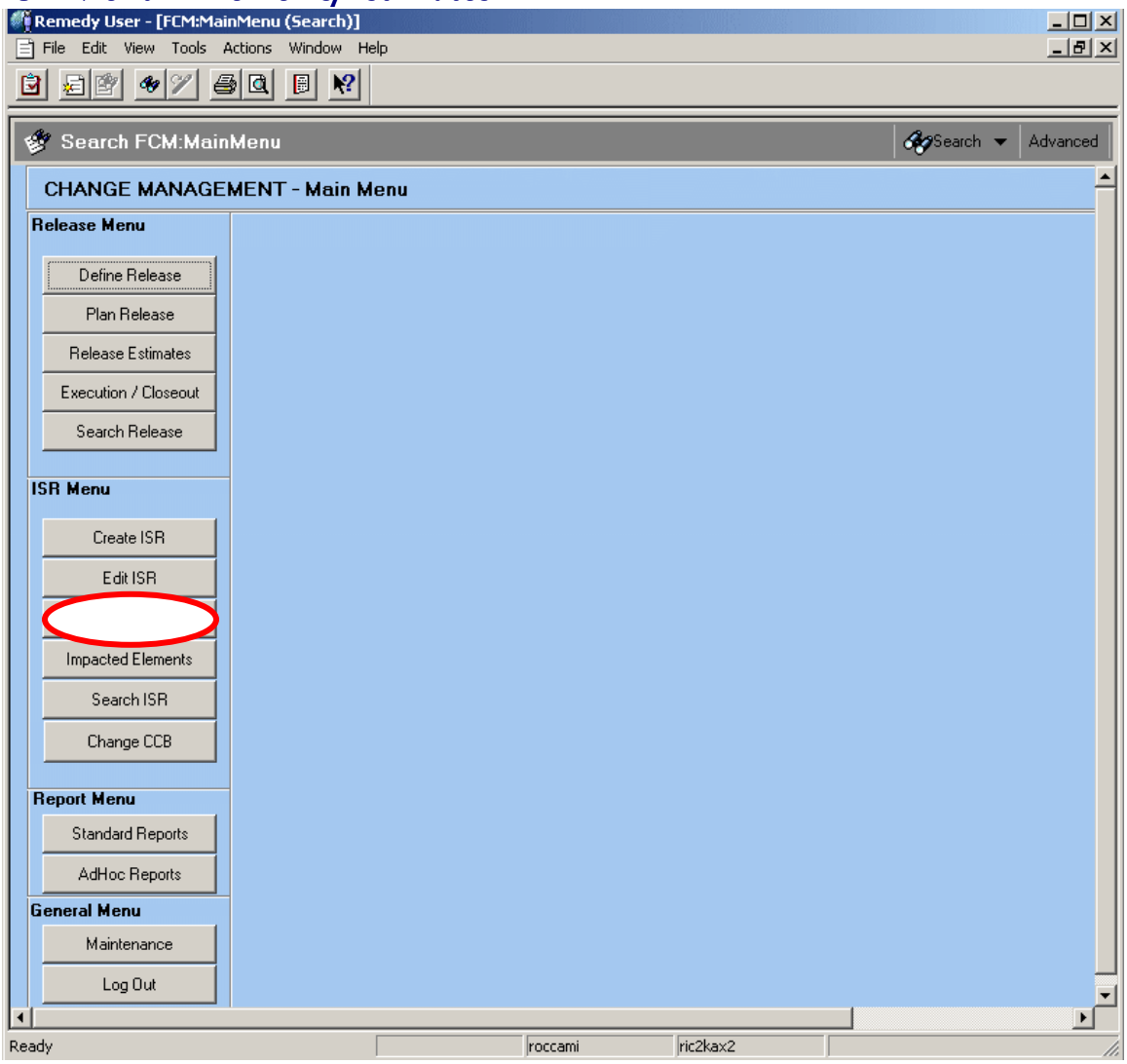
#	Tab Name	Group Name	Field Name	Instructions/Comments
1	ISR Details	Approvals	Division Director Name	Type letters, numbers, symbols or keywords or choose an option from the FCM:MNU:Personnel:DivsnDirctr menu to modify this field. Division Director Name is a character field and can contain up to 50 characters.
2	ISR Details	Approvals	Approval Date	Select a date from the calendar editor or type a value to modify this field. Approval Date is a TimeStamp field. MM/DD/CCYY. Edit Check: Equal/Less than Current Date.
3	ISR Details	Approvals	Approved?	Approved? is a selection field. Selection type include: 'Yes', 'No' or '(clear)'. Note: 'ISR Status' field is set to 'Ready-Division Director Approved' for 'Yes' setting and 'Closed-Cancelled' for 'No' setting. Warning pop-up appears to confirm the ISR is to be 'Closed-Cancelled' before the action is carried out.
4	ISR Details	Approvals	Additional Approvals	Screen shown below (1a) is displayed when 'Additional Approvals' button is clicked. Required approvals are entered as needed. Note: This button is enabled for 'LMRs' only.
5	-	DMAS Approvals	Division(s) Impacted	Type letters, numbers, symbols or keywords. Division(s) Impacted is a character field and can contain up to 69 characters. Applicable to 'LMR' only.
6	-	DMAS Approvals	Impacted Division Director	Type letters, numbers, symbols or keywords or choose an option from the FCM:MNU:Personnel:DivsnDirctr menu to modify this field. Impacted

#	Tab Name	Group Name	Field Name	Instructions/Comments
				Division Director is a character field and can contain up to 50 characters. Applicable to 'LMR' only.
7	-	DMAS Approvals	Date	Select a date from the calendar editor or type a value to modify this field. Date is a TimeStamp field. MM/DD/CCYY Applicable to 'LMR' only.
8	-	FHS Approvals	FHS Systems Manager	Name of Systems Manager approving the change. Applicable to 'LMRs' only.
9	-	FHS Approvals	Date	Select a date from the calendar editor or type a value to modify this field. Date is a TimeStamp field. MM/DD/CCYY Applicable to 'LMRs' only.
10	ISR Details	Approvals	CCB/CM Approval	Type letters, numbers, symbols or keywords or choose an option from the FCM:MNU:Personnel:CCB/CM menu to modify this field. CCBCM:VA CCB/CM Approval is a character field and can contain up to 50 characters. Applicable to 'Adhoc ISRs' only.
11	ISR Details	Approvals	CCB/CM Date	Select a date from the calendar editor or type a value to modify this field. CCB/CM Date is a TimeStamp field. MM/DD/CCYY Applicable to 'Adhoc ISRs' only. Edit Check: Equal/Less than Current Date.

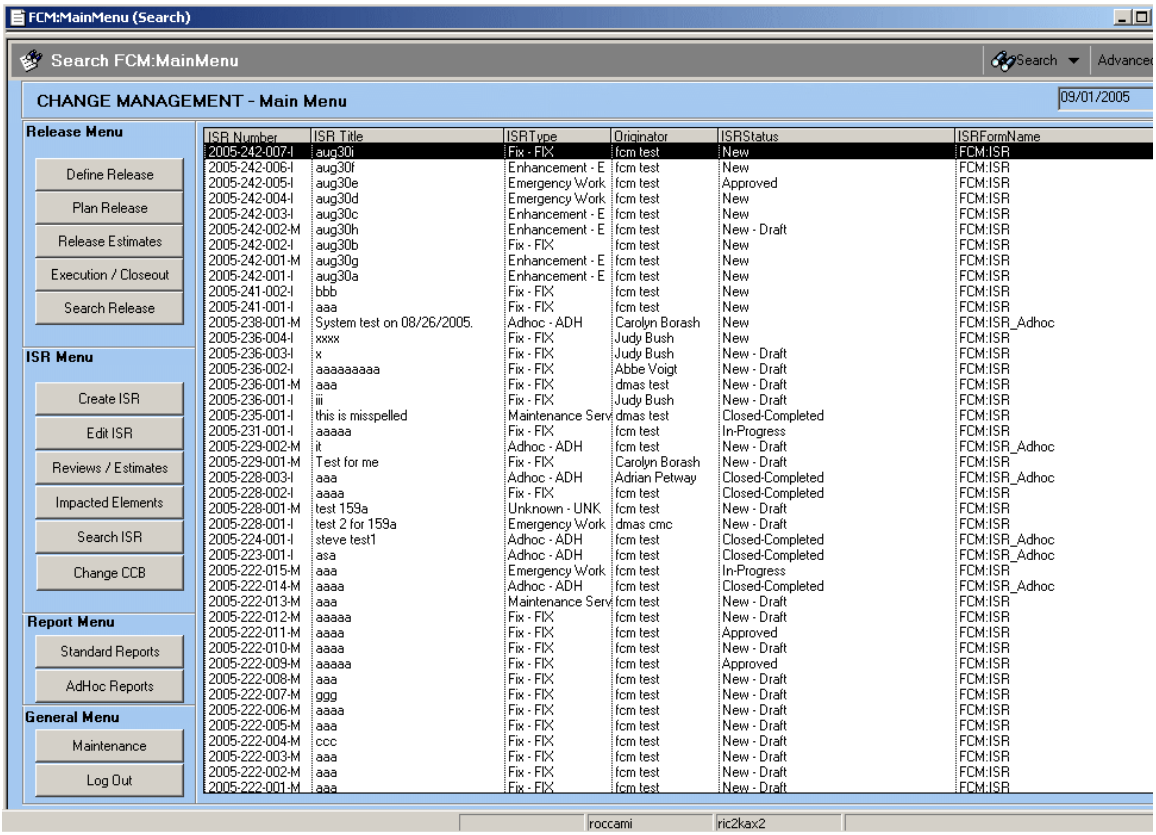
1a.


AR System User - [FCM:ISR (Modify)]
File Edit View Tools Actions Window Help
Modify FCM:ISR 000000000000417
Save
Platform (R) MMIS
ISR Number 2003-294-003-M
ISR Type Letter Maintenance Request - LMR
ISR Title (R) Modify PD-91 Cancellation Letter
Spell Chk
ISR Status Closed-Completed
Release No.
Prev Release No
Build No ...
Print ISR ...
ISR Details
LMR Data
Reviews / Estimates
Create ISR
Originator (R) Deborah Sprang
Phone (R) 804-225-2364
User Project
Impact Type (R) Mandated Policy Change by Ch
Subsystem (R) Other
User(s) Impacted (R)
Recipients Yes
Providers No
Help Desk Yes
ISR Purpose (R)
n/a
FCM:AdditionalApproval (Ric2ka07)
DMAS Approvals
Division(s) Impacted
Impacted Division Director
Date
Program Support
Jim Cohen
10/21/2003
FHS Approvals
FHS Systems Manager
Date
Save
Impact if Disapproved
Notification will not be compliant with regulations effective 10-1-03.
Spell Chk
DSS Impacted
DSS Confirmation Name
State Plan Involvement
State Plan Number
Problem Tickets ...
Approvals
Division Director Name Cynthia Jones
Division Director Date 11/6/2003
Approved?
Additional Approvals ...
Ready
Ric2ka07
start
N:\groups\VAMMIS\C...
CM - User Training V1...
Remedy User - [FCM:...
Citrix Program Neigh...
AR System User - [F...
10:17 AM

ISR Menu – 'Reviews/Estimates'

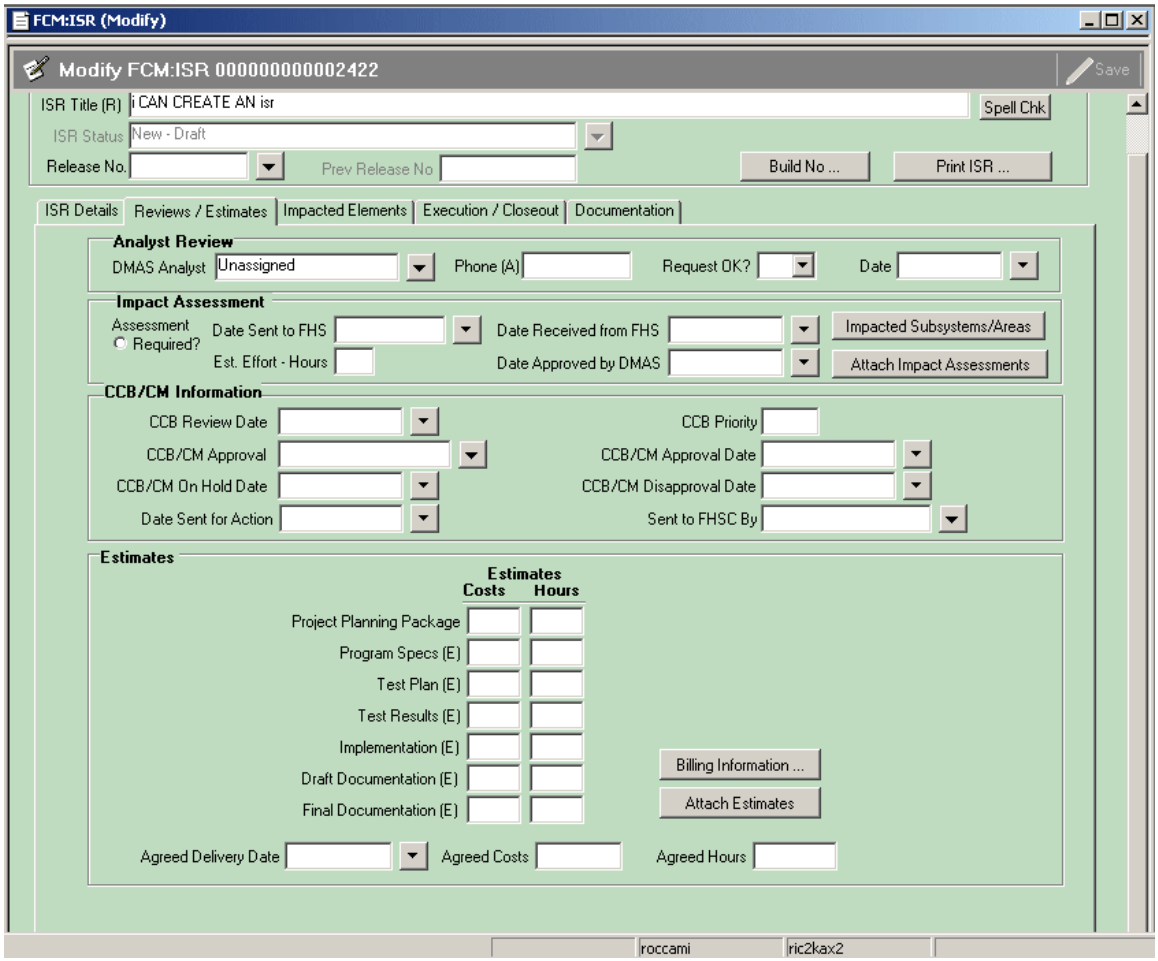


- 'Reviews/Estimates' is a shortcut to the position at the 'Reviews/Estimates' tab which contains approval, DMAS Analyst assignment and estimate information. This is accessible and can be viewed by all users. Only DMAS CM Coordinator can update information.
- Click on 'Reviews/Estimates' option under 'ISR Menu' and the screen shown below is displayed.

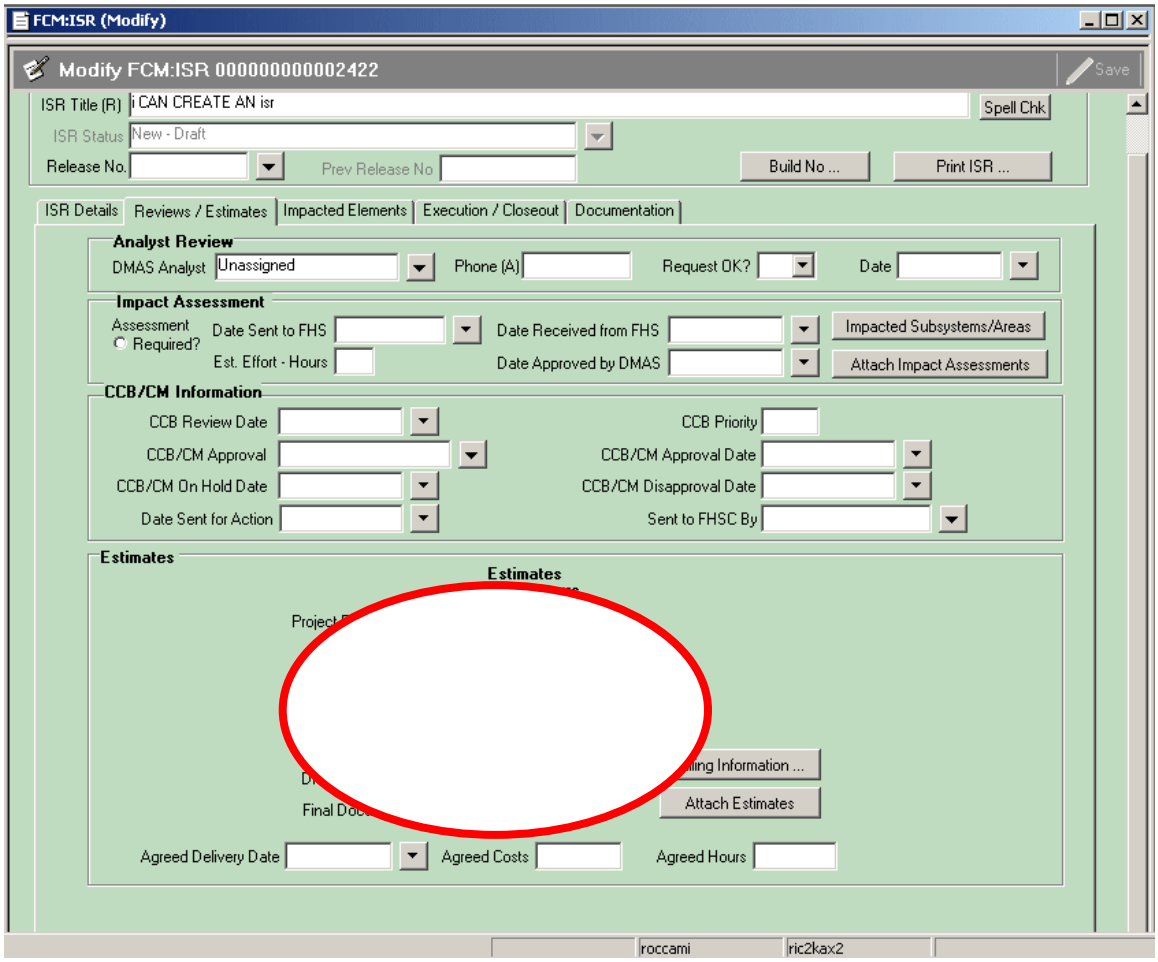


- List of available ISRs is shown. Double-click on the 'ISR Number' of interest to access the information for the ISR. For all ISR Types except 'ADH', screen displayed will be the one shown below.

  Note: For ISR Type 'ADH', the response would be the same as for 'Execution / Close Out' since the 'Reviews/Estimates' tab does not exist for it.

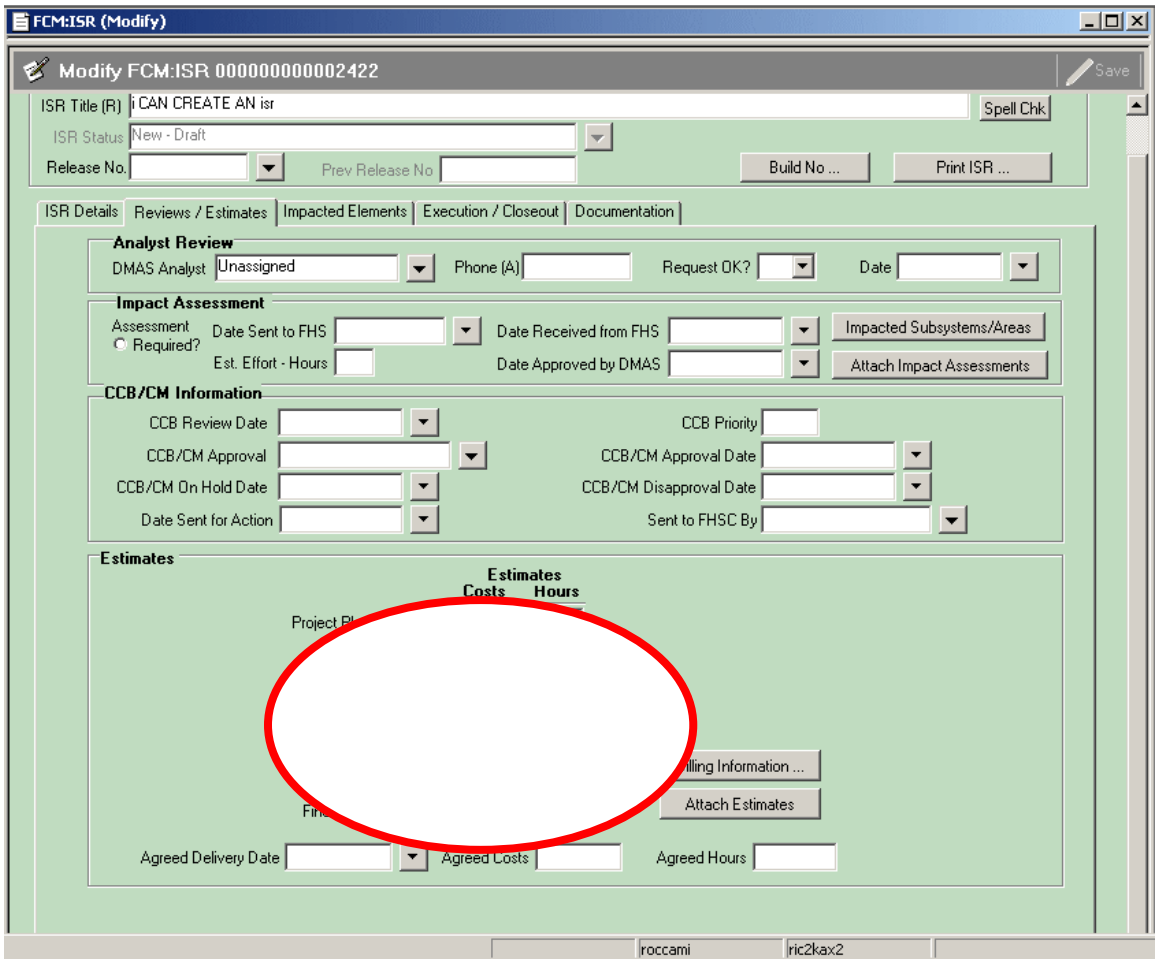

FCM:ISR (Modify)
Modify FCM:ISR 000000000002422
Save
ISR Title (R)
i CAN CREATE AN isr
Spell Chk
ISR Status
New - Draft
Release No.
Prev Release No
Build No ...
Print ISR ...
ISR Details
Reviews / Estimates
Impacted Elements
Execution / Closeout
Documentation
Analyst Review
DMAS Analyst
Unassigned
Phone (A)
Request OK?
Date
Impact Assessment
Assessment Required?
Date Sent to FHS
Est. Effort - Hours
Date Received from FHS
Date Approved by DMAS
Impacted Subsystems/Areas
Attach Impact Assessments
CCB/CM Information
CCB Review Date
CCB/CM Approval
CCB/CM On Hold Date
Date Sent for Action
CCB Priority
CCB/CM Approval Date
CCB/CM Disapproval Date
Sent to FHSC By
Estimates
Estimates
Costs
Hours
Project Planning Package
Program Specs (E)
Test Plan (E)
Test Results (E)
Implementation (E)
Draft Documentation (E)
Final Documentation (E)
Billing Information ...
Attach Estimates
Agreed Delivery Date
Agreed Costs
Agreed Hours
roccami
ric2kax2

- **IMPORTANT NOTES**
  - ISR with ISR Type 'ENH' or 'EWO' will have the ***ISR fields*** grouped under 'Estimates' ***enabled*** (as shown in screen below) for data entry if the Project Planning Package (PPP) for a Planned Release has indicated that the deliverables will be 'One Set per ISR'. In this scenario, the system will rollup the relevant data from the ISR to the Release level when the 'Refresh Data for Release' (present on 'Execution / Closeout' tab for Release) is clicked – can be done at any time. Information at the Release level is replaced each time it is clicked. Updates can be done by DMAS CM Coordinator only.



- ISR with ISR Type 'ENH' or 'EWO' will have the ***ISR fields*** grouped under 'Estimates' ***disabled*** (as shown in screen below) for data entry if the Project Planning Package (PPP) for a Planned Release has indicated that the deliverables will be 'One Set for Release'. Only DMAS CM Coordinator can update Estimates field and DMAS related information.

  Note: Estimates (Costs & Hours) will not be populated at the ISR level when 'Refresh Data for ISR' (present on 'Execution / Closeout' tab for Release) is clicked as it is impossible to apportion the correct Costs & Hours for each ISR using the Release values.



- Information on the fields related to this screen is shown in the table below.
  Note: 'Estimates' for Costs and Hours would be entered when the information is available.

#	Tab Name	Group Name	Field Name	Instructions/Comments
1	Reviews/Estimates	Analyst Review	DMAS Analyst	Type letters, numbers, symbols or keywords or choose an option from the FCM:MNU:Personnel:DMASAnalyst menu to modify this field. DMAS Analyst is a character field and can contain up to 50 characters.
2	Reviews/Estimates	Analyst Review	Phone (A)	Phone number can be accepted or pulled from the FCM:Personnel. The Phone (A) field can contain 15 characters.
3	Reviews/Estimates	Analyst Review	Request OK?	Request OK? is a selection field. Selection type include: 'Yes', 'No' or '(clear)'. Note: 'ISR Status' field is set to 'New - Draft' for 'No' setting. Warning pop-up appears to confirm the 'ISR Status' is to be reset so that the ISR can be corrected.
4	Reviews/Estimates	Analyst Review	Date	Select a date from the calendar editor or type a value to modify this field. Date is a TimeStamp field. MM/DD/CCYY.
5	Reviews/Estimates	Impact Assessment	Assessment Required?	Disabled/Not Applicable.
6	Reviews/Estimates	Impact Assessment	Date Sent to FHS	Select a date from the calendar editor or type a value to modify this field. Date Sent to FHS is a TimeStamp field. MM/DD/CCYY Edit Check: Equal/Less than Current Date.
7	Reviews/Estimates	Impact Assessment	Date Received from FHS	Select a date from the calendar editor or type a value to modify this field. Date Received from FHS is a TimeStamp field. MM/DD/CCYY Edit Check: Equal/Less than Current Date.
8	Reviews/Estimates	Impact	Est. Effort - Hours	A number can be accepted between

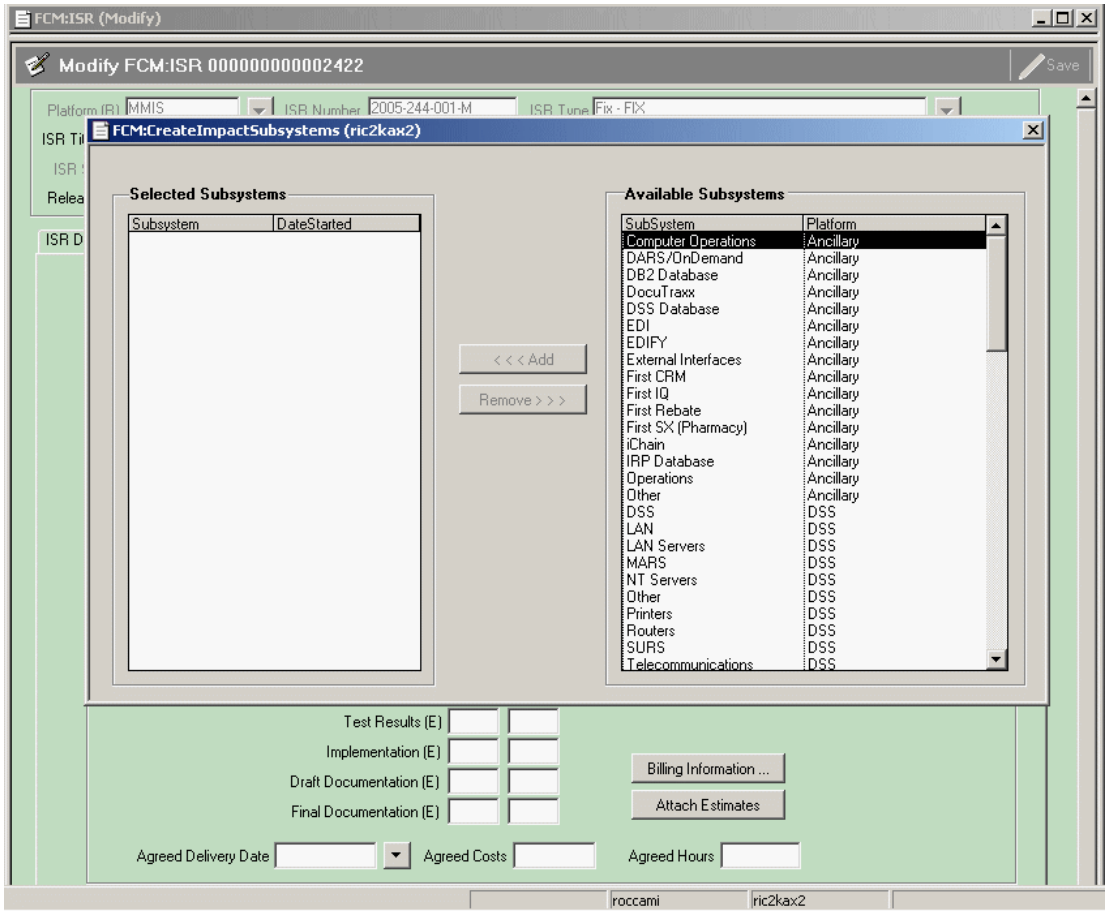
#	Tab Name	Group Name	Field Name	Instructions/Comments
		Assessment		0 and 2,147,483,647 to modify the field. Est. Effort - Hours is an Integer field.
9	Reviews/Estimates	Impact Assessment	Date Approved by DMAS	Select a date from the calendar editor or type a value to modify this field. Date Approved by DMAS is a TimeStamp field. MM/DD/CCYY Edit Check: Equal/Less than Current Date.
11	Reviews/Estimates	Impact Assessment	Impacted Subsystems/Areas	Impacted Subsystems/Areas Screen shown below is displayed when 'Impacted Subsystems/Areas' button is clicked. (1a) This screens loads related elements that are impacted by the ISR. The Add and Remove buttons pushes or deletes data into the support table field, 'Subsystems/Areas' on the 'Execution/Closeout' page..
12	Reviews/Estimates	Impact Assessment	Attach Impact Assessments Button	Disabled.
13	Reviews/Estimates	CCB/CM Information	CCB Review Date	Select a date from the calendar editor or type a value to modify this field. CCB Review Date is a TimeStamp field. MM/DD/CCYY Edit Check: Equal/Less than Current Date.
14	Reviews/Estimates	CCB/CM Information	CCB Priority	Type letters, numbers, symbols or keywords to modify this field. CCB Priority field is a character field and can contain up to 5 characters.
15	Reviews/Estimates	CCB/CM Information	CCB/CM Approval	Type letters, numbers, symbols or keywords or choose an option from the FCM:MNU:Personnel:CCBCM:VA menu to modify this field. CCB/CM Approval field is a character field and can contain up to 50 characters.
16	Reviews/Estimates	CCB/CM Information	CCB/CM Approval Date	Select a date from the calendar editor or type a value to modify this field. Approval Date is a TimeStamp field. MM/DD/CCYY Edit Check: Equal/Less than Current Date.

#	Tab Name	Group Name	Field Name	Instructions/Comments
17	Reviews/Estimates	CCB/CM Information	CCB/CM On Hold Date	Select a date from the calendar editor or type a value to modify this field. CCB/CM On Hold Date is a TimeStamp field. MM/DD/CCYY Edit Check: Equal/Less than Current Date.
18	Reviews/Estimates	CCB/CM Information	CCB/CM Disapproval Date	Select a date from the calendar editor or type a value to modify this field. CCB/CM Disapproval Date is a TimeStamp field. MM/DD/CCYY Edit Check: Equal/Less than Current Date. Note: 'ISR Status' field is set to 'Closed-Cancelled' when an ISR is 'Disapproved'.
19	Reviews/Estimates	CCB/CM Information	Date Sent for Action	Select a date from the calendar editor or type a value to modify this field. Date Sent for Action is a TimeStamp field. MM/DD/CCYY Edit Check: Equal/Less than Current Date.
20	Reviews/Estimates	CCB/CM Information	Sent to FHSC by	Not applicable.
21	Reviews/Estimates	Estimates	Project Planning Package - Costs	A number can be accepted between 0 and 2,147,483,647 to modify the field. Project Planning Package. is an Integer field.
22	Reviews/Estimates	Estimates	Project Planning Package. - Hours	A number can be accepted between 0 and 2,147,483,647 to modify the field. PPPEstHours (536871142) is an Integer field.
23	Reviews/Estimates	Estimates	Program Specs (E)- Costs	A number can be accepted between 0 and 2,147,483,647 to modify the field. Program Specs (E) is an Integer field.
24	Reviews/Estimates	Estimates	Program Specs (E)- Hours	A number can be accepted between 0 and 2,147,483,647 to modify the field. ProgramSpecsEstHours (536871144) is an Integer field.
25	Reviews/Estimates	Estimates	Test Plan (E)- Costs	A number can be accepted between 0 and 2,147,483,647 to modify the field. Test Plan (E) is an Integer

#	Tab Name	Group Name	Field Name	Instructions/Comments
				field.
26	Reviews/Estimates	Estimates	Test Plan (E)– Hours	A number can be accepted between 0 and 2,147,483,647 to modify the field. TestPlanEstHours (536871146) is an Integer field.
27	Reviews/Estimates	Estimates	Test Results (E)- Costs	A number can be accepted between 0 and 2,147,483,647 to modify the field. Test Results (E) is an Integer field.
28	Reviews/Estimates	Estimates	Test Results (E) – Hours	A number can be accepted between 0 and 2,147,483,647 to modify the field. TestResultsEstHours (536871148) is an Integer field.
29	Reviews/Estimates	Estimates	Implementation (E)– Costs	A number can be accepted between 0 and 2,147,483,647 to modify the field. Implementation (E) is an Integer field.
30	Reviews/Estimates	Estimates	Implementation (E) – Hours	A number can be accepted between 0 and 2,147,483,647 to modify the field. ImplementationEstHours (536871150) is an Integer field.
31	Reviews/Estimates	Estimates	Draft Documentation (E)– Costs	A number can be accepted between 0 and 2,147,483,647 to modify the field. Documentation (E) is an Integer field.
32	Reviews/Estimates	Estimates	Draft Documentation (E)– Hours	A number can be accepted between 0 and 2,147,483,647 to modify the field. DraftDocumentationEstHours (536871152) is an Integer field.
33	Reviews/Estimates	Estimates	Final Documentation (E)– Costs	A number can be accepted between 0 and 2,147,483,647 to modify the field. Documentation (E) is an Integer field.
34	Reviews/Estimates	Estimates	Final Documentation (E) – Hours	A number can be accepted between 0 and 2,147,483,647 to modify the field. FinalDocumentationEstHours (536871154) is an Integer field.
34	Reviews/Estimates	Estimates	Agreed Delivery Date	Select a date from the calendar editor or type a value to modify this field. Agreed Delivery Date is a TimeStamp field. MM/DD/CCYY Edit Check: Greater than Current Date.
35	Reviews/Estimates	Estimates	Agreed Costs	A number can be accepted between 0 and 2,147,483,647 to modify the field. Agreed Costs is an Integer

#	Tab Name	Group Name	Field Name	Instructions/Comments
				field.
36	Reviews/Estimates	Estimates	Agreed Hours	A number can be accepted between 0 and 45,000 to modify the field. Agreed Hours is an Integer field.
37	-	Estimates	Billing Information …	FCM:BillingInfo Screen shown below (1b) is displayed when 'Billing Information …' is clicked. This provides a facility to have the estimates, actuals and billing information displayed. Information can be entered on it and it will be captured and shown on 'Reviews/Estimates' and 'Execution/ Close Out' tabs.
38	-	Estimates	Attach Estimates	Not Applicable.

1a.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ISR Type Fix - FIX
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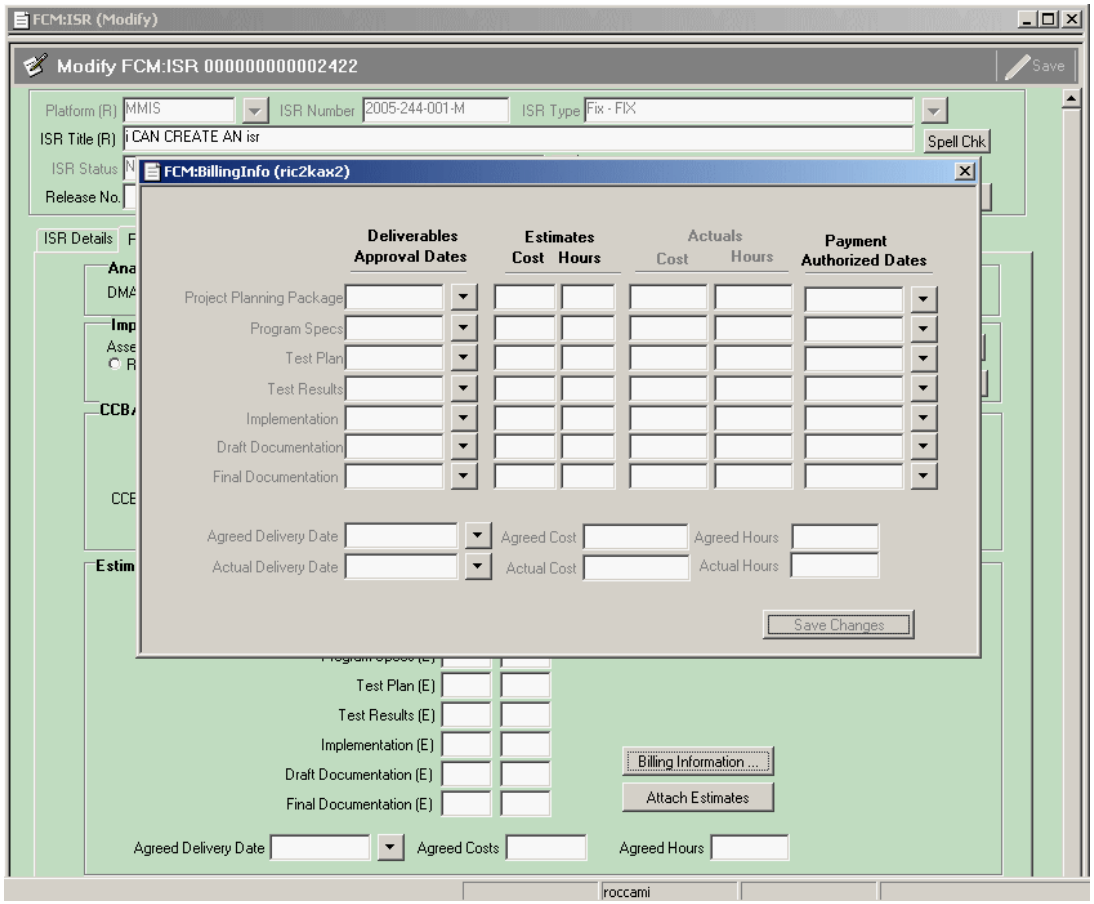
Selected Subsystems
Subsystem
DateStarted
< < < Add
Remove > > >
Available Subsystems
SubSystem
Platform
Computer Operations Ancillary
DARS/OnDemand Ancillary
DB2 Database Ancillary
DocuTraxx Ancillary
DSS Database Ancillary
EDI Ancillary
EDIFY Ancillary
External Interfaces Ancillary
First CRM Ancillary
First IQ Ancillary
First Rebate Ancillary
First SX (Pharmacy) Ancillary
iChain Ancillary
IRP Database Ancillary
Operations Ancillary
Other Ancillary
DSS DSS
LAN DSS
LAN Servers DSS
MARS DSS
NT Servers DSS
Other DSS
Printers DSS
Routers DSS
SURS DSS
Telecommunications DSS
Test Results (E)
Implementation (E)
Draft Documentation (E)
Final Documentation (E)
Billing Information ...
Attach Estimates
Agreed Delivery Date
Agreed Costs
Agreed Hours
roccami
ric2kax2

1b.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Modify FCM:ISR 000000000002422
Save
Platform (R)
MMIS
ISR Number
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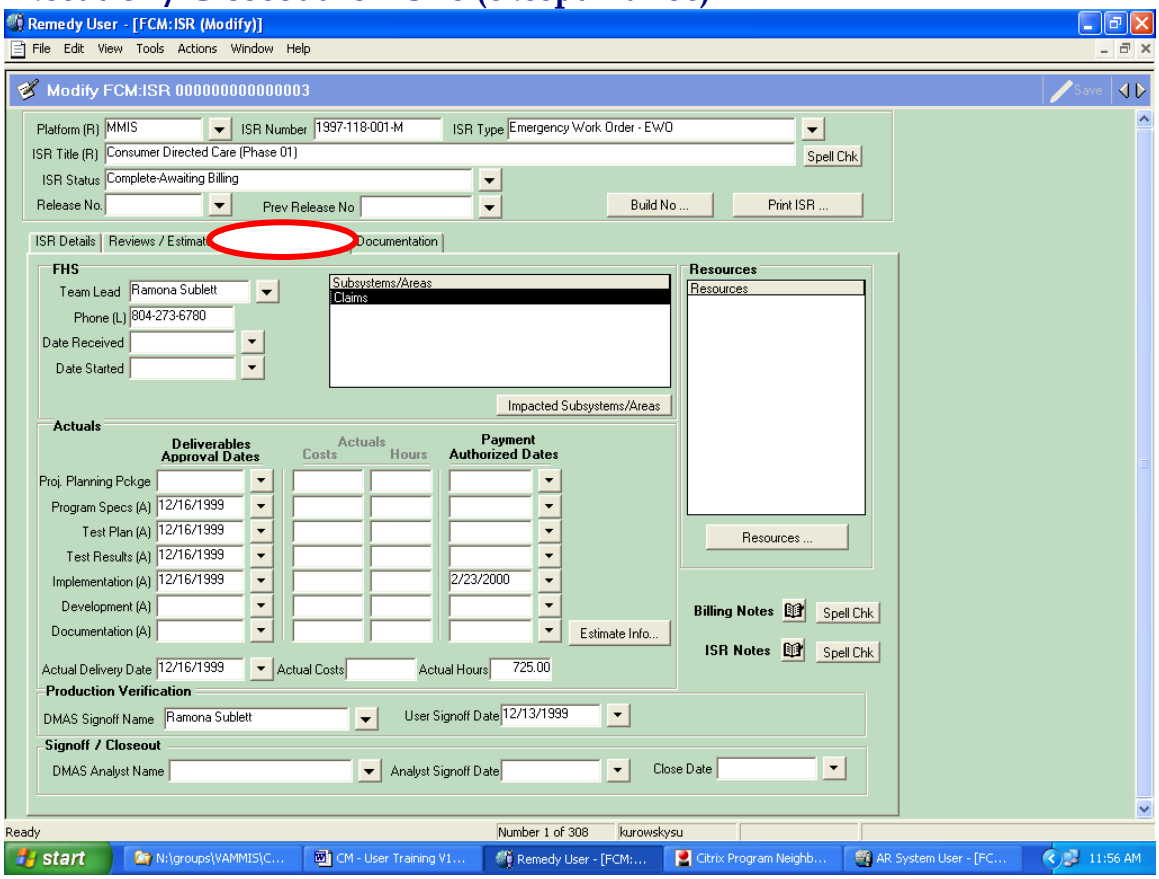
ISR Type
Fix - FIX
ISR Title (R)
i CAN CREATE AN isr
Spell Chk
ISR Status
Release No.
ISR Details
FCM:BillingInfo (ric2kax2)
Deliverables Approval Dates
Estimates Cost Hours
Actuals Cost Hours
Payment Authorized Dates
Project Planning Package
Program Specs
Test Plan
Test Results
Implementation
Draft Documentation
Final Documentation
Agreed Delivery Date
Agreed Cost
Agreed Hours
Actual Delivery Date
Actual Cost
Actual Hours
Save Changes
Test Plan (E)
Test Results (E)
Implementation (E)
Draft Documentation (E)
Final Documentation (E)
Billing Information ...
Attach Estimates
Agreed Delivery Date
Agreed Costs
Agreed Hours
roccami

Execution / Closeout for ISRs (except Adhoc)



- Information on the fields related to this screen is shown in the table below.
  Note: 'Actuals' Hours will be system loaded using an interface file provided by Project Invision / MS Project portion of the system.

#	Tab Name	Group Name	Field Name	Instructions/Comments
1	Execution / Close Out	FHS	Team Lead	Letters, numbers, symbols or keywords can be typed or choose an option from the FCM:MNU:Personnel:FHSTeamLead menu to modify this field. Team Lead is a character field and can contain up to 50 characters.
2	Execution / Close Out	FHS	Phone (L)	Phone number can be accepted or pulled from the FCM:Personnel. The Phone (L) field can contain 15 characters. For First Health CM Coordinator use only.
3	Execution / Close Out	FHS	Date Received	Select a date from the calendar editor or type a value to modify this field. Date Received is a TimeStamp field.

#	Tab Name	Group Name	Field Name	Instructions/Comments
				MM/DD/CCYY Edit Check: Equal/Less than Current Date. For First Health CM Coordinator use only.
4	Execution / Close Out	FHS	Date Started	Select a date from the calendar editor or type a value to modify this field. Date Started is a TimeStamp field. MM/DD/CCYY For First Health CM Coordinator use only.
5	Execution / Close Out	FHS	Subsystem/Areas	Displays previously selected subsystems that impact this ISR.
6	Execution / Close Out	FHS	Impacted Subsystems/Areas	When a subsystem from the Subsystems/Areas list is highlighted and Impacted Subsystem/ Areas button is clicked, 'ISR_ImpactedSubsystem' Screen (1a) is displayed.
7	-	ISR_Impacted Subsystems	ISR Number	Displays ISR number.
8	-	ISR_Impacted Subsystems	Platform	Displays ISR platform.
9	-	ISR_Impacted Subsystems	Date Started	Select a date from the calendar editor or type a value to modify this field. Date Started is a TimeStamp field. MM/DD/CCYY
10	-	ISR_Impacted Subsystems	Subsystem	Displays ISR subsystem.
11	-	DMAS Signoff - ISR_Impacted Subsystems	Action Completed By	Letters, numbers, symbols or keywords can be typed or choose an option from the FCM:MNU:Personnel menu to modify this field. Action Completed By is a character field and can contain up to 50 characters.
12	-	DMAS Signoff - ISR_Impacted Subsystems	Date	Select a date from the calendar editor or type a value to modify this field. Date is a TimeStamp field. MM/DD/CCYY Edit Check: Less than or equal to Current Date.
13	-	DMAS Signoff - ISR_Impacted Subsystems	Approved By	Letters, numbers, symbols or keywords can be typed or choose an option from the FCM:MNU:Personnel menu to modify this field. Approved By is a

#	Tab Name	Group Name	Field Name	Instructions/Comments
				character field and can contain up to 50 characters.
14	-	DMAS Signoff - ISR_Impacted Subsystems	Date	Select a date from the calendar editor or type a value to modify this field. Date is a TimeStamp field. MM/DD/CCYY Edit Check: Less than or equal to Current Date
15	-	FHS Signoff - ISR_Impacted Subsystems	Completed By	Letters, numbers, symbols or keywords can be typed or choose an option from the FCM:MNU:Personnel:FHSTeamLead menu to modify this field. Completed By is a character field and can contain up to 50 characters..
16	-	FHS Signoff - ISR_Impacted Subsystems	Date	Select a date from the calendar editor or type a value to modify this field. Date is a TimeStamp field. MM/DD/CCYY Edit Check: Less than or equal to Current Date
17	-	FHS Signoff - ISR_Impacted Subsystems	Unit Test Signoff	Letters, numbers, symbols or keywords can be typed or choose an option from the FCM:MNU:Personnel:FHSTeamLead menu to modify this field. Unit Test Signoff field is a character field and can contain up to 50 characters.
18	-	FHS Signoff - ISR_Impacted Subsystems	Date	Select a date from the calendar editor or type a value to modify this field. Date is a TimeStamp field. MM/DD/CCYY Edit Check: Less than or equal to Current Date
19	-	FHS Signoff - ISR_Impacted Subsystems	System Test Signoff	Letters, numbers, symbols or keywords can be typed or choose an option from the FCM:MNU:Personnel:FHSTeamLead menu to modify this field. System Test Signoff is a character field and can contain up to 50 characters.
20	-	FHS Signoff - ISR_Impacted Subsystems	Date	Select a date from the calendar editor or type a value to modify this field. Date is a TimeStamp field. MM/DD/CCYY Edit Check: Less than or equal to Current Date
21	-	FHS Signoff -	Final Signoff	Letters, numbers, symbols or

#	Tab Name	Group Name	Field Name	Instructions/Comments
		ISR_Impacted Subsystems		keywords can be typed or choose an option from the FCM:MNU:Personnel:FHSTeamLead menu to modify this field. Final Signoff field is a character field and can contain up to 50 characters.
22	-	FHS Signoff - ISR_Impacted Subsystems	Date	Select a date from the calendar editor or type a value to modify this field. Date is a TimeStamp field. MM/DD/CCYY Edit Check: Less than or equal to Current Date
23	-	FHS Signoff - ISR_Impacted Subsystems	Migrated By	Letters, numbers, symbols or keywords can be typed or choose an option from the FCM:MNU:Personnel:FHSTeamLead menu to modify this field. Migrated By is a character field and can contain up to 50 characters.
24	-	FHS Signoff - ISR_Impacted Subsystems	Date	Select a date from the calendar editor or type a value to modify this field. Date is a TimeStamp field. MM/DD/CCYY . Edit Check: Less than or equal to Current Date
25	-	ISR_Impacted Subsystems	Save Changes	When 'Save Changes' button is clicked, changes are saved. When exit button is clicked, return to the 'Execution/Closeout' page.
26	Execution/ Closeout	Resources	Resources	FCM:UserContactResources screen shown below (1b) is displayed when 'Resources' button is clicked. This dialog form is used to connect "Resources" to an ISR. It fills the table fields on the related ISR when the ISR is displayed or saved. Walk table logic is used to store the data on the ISR. When drop down button next to the name field is clicked, a name is highlighted and clicked 'O.K', then that name will be displayed on the Name field. When name is displayed in the name field and the 'Add' button is clicked' then the name will be added to the 'List of

#	Tab Name	Group Name	Field Name	Instructions/Comments
				Personnel' table. When a name in 'List of Personnel' field is double clicked, it is displayed in the name field. When 'Remove' button is clicked, the name will be deleted from the 'List of Personnel' table. (1c) For First Health CM Coordinator use only.
27	Execution / Close Out	Actuals	Proj. Planning Pckge – Deliverables Approval Dates	Select a date from the calendar editor or type a value to modify this field. Proj. Planning Pckge is a TimeStamp field. MM/DD/CCYY Edit Check: Equal/Less than Current Date. For DMAS CM Coordinator use only.
28	Execution / Close Out	Actuals	Proj. Planning Pckge – Actuals: Costs	A number 0 – 99999999.99 with two digits to the right of the decimal point can be accepted to modify this field. The PPPActCosts (536871175) is a decimal field.
29	Execution / Close Out	Actuals	Proj. Planning Pckge. – Actuals: Hours	A number 0 – 99999999.99 with two digits to the right of the decimal point can be accepted to modify this field. The PPPActsHours (536871176) is a decimal field.
30	Execution / Close Out	Actuals	Proj. Planning Pckge – Payment Authorized Approval Dates	Select a date from the calendar editor or type a value to modify this field. PPPPayAuthDate is a TimeStamp field. MM/DD/CCYY Edit Check: Equal/Less than Current Date. For DMAS CM Coordinator use only.
31	Execution / Close Out	Actuals	Program Specs (A) – Deliverables Approval Date	Select a date from the calendar editor or type a value to modify this field. Program Specs (A) is a TimeStamp field. MM/DD/CCYY Edit Check: Equal/Less than Current Date. For DMAS CM Coordinator use only.
32	Execution / Close Out	Actuals	Program Specs (A)– Actuals:	A number 0 – 99999999.99 with two digits to the right of the decimal

#	Tab Name	Group Name	Field Name	Instructions/Comments
			Costs	point can be accepted to modify this field. The ProgramSpecsActCosts (536871177) is a decimal field.
33	Execution / Close Out	Actuals	Program Specs (A) – Actuals: Hours	A number 0 – 99999999.99 with two digits to the right of the decimal point can be accepted to modify this field. The ProgramSpecsActsHours (536871178) is a decimal field.
34	Execution / Close Out	Actuals	Program Specs (A) – Payment Authorized Approval Dates	Select a date from the calendar editor or type a value to modify this field. ProgramSpecsPayAuthDate is a TimeStamp field. MM/DD/CCYY Edit Check: Equal/Less than Current Date. For DMAS CM Coordinator use only.
35	Execution / Close Out	Actuals	Test Plan (A) – Deliverables Approval Dates	Select a date from the calendar editor or type a value to modify this field. Test Plan (A) is a TimeStamp field. MM/DD/CCYY Edit Check: Equal/Less than Current Date. For DMAS CM Coordinator use only.
36	Execution / Close Out	Actuals	Test Plan (A)– Actuals: Costs	A number 0 – 99999999.99 with two digits to the right of the decimal point can be accepted to modify this field. The TestPlanActCosts (536871179) is a decimal field.
37	Execution / Close Out	Actuals	Test Plan (A)– Actuals: Hours	A number 0 – 99999999.99 with two digits to the right of the decimal point can be accepted to modify this field. The TestPlanActsHours (536871180) is a decimal field.
38	Execution / Close Out	Actuals	Test Plan (A) – Payment Authorized Approval Dates	Select a date from the calendar editor or type a value to modify this field. TestPlanPayAuthDate is a TimeStamp field. MM/DD/CCYY Edit Check: Equal/Less than Current Date. For DMAS CM Coordinator use only.
39	Execution / Close Out	Actuals	Test Results (A) – Deliverables Approval Dates	Select a date from the calendar editor or type a value to modify this field. Test Results (A) is a TimeStamp

#	Tab Name	Group Name	Field Name	Instructions/Comments
				field. MM/DD/CCYY Edit Check: Equal/Less than Current Date. For DMAS CM Coordinator use only.
40	Execution / Close Out	Actuals	Test Results (A) – Actuals: Costs	A number 0 – 99999999.99 with two digits to the right of the decimal point can be accepted to modify this field. The TestResultsActCosts (536871181) is a decimal field.
41	Execution / Close Out	Actuals	Test Results (A) – Actuals: Hours	A number 0 – 99999999.99 with two digits to the right of the decimal point can be accepted to modify this field. The TestResultsActsHours (536871182) is a decimal field.
42	Execution / Close Out	Actuals	Test Results (A) – Payment Authorized Approval Dates	Select a date from the calendar editor or type a value to modify this field. TestResultsPayAuthDate is a TimeStamp field. MM/DD/CCYY Edit Check: Equal/Less than Current Date. For DMAS CM Coordinator use only.
43	Execution / Close Out	Actuals	Implementation (A) – Deliverables Approval Dates	Select a date from the calendar editor or type a value to modify this field. Implementation (A) is a TimeStamp field. MM/DD/CCYY Edit Check: Equal/Less than Current Date. For DMAS CM Coordinator use only.
44	Execution / Close Out	Actuals	Implementation (A) – Actuals: Costs	A number 0 – 99999999.99 with two digits to the right of the decimal point can be accepted to modify this field. The ImplementationActCosts (536871183) is a decimal field.
45	Execution / Close Out	Actuals	Implementation (A) – Actuals: Hours	A number 0 – 99999999.99 with two digits to the right of the decimal point can be accepted to modify this field. The ImplementationActsHours (536871184) is a decimal field.
46	Execution / Close Out	Actuals	Implementation (A) – Payment Authorized	Select a date from the calendar editor or type a value to modify this field. ImplementationPayAuthDate is a

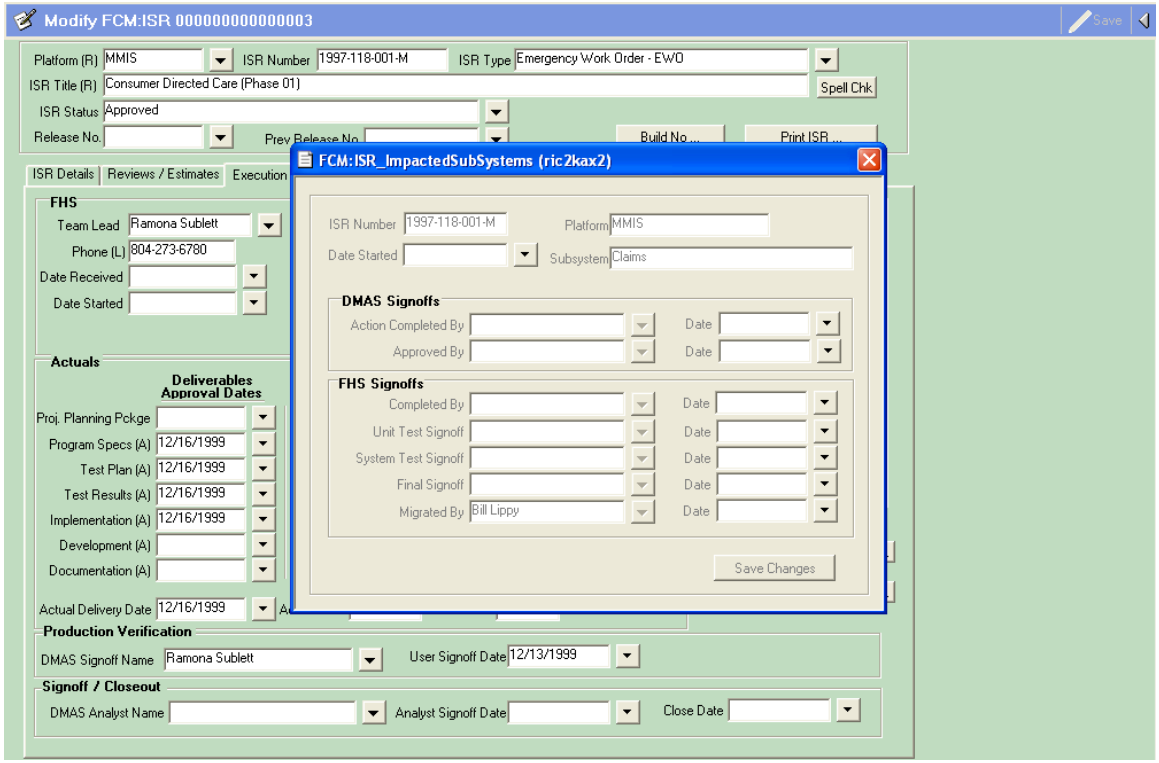
#	Tab Name	Group Name	Field Name	Instructions/Comments
			Approval Date	TimeStamp field. MM/DD/CCYY Edit Check: Equal/Less than Current Date. For DMAS CM Coordinator use only.
47	Execution / Close Out	Actuals	Development (A) – Deliverables Approval Dates	Select a date from the calendar editor or type a value to modify this field. Development (A) is a TimeStamp field. MM/DD/CCYY Edit Check: Equal/Less than Current Date. For DMAS CM Coordinator use only.
48	Execution / Close Out	Actuals	Development (A) – Actuals: Costs	A number 0 – 99999999.99 with two digits to the right of the decimal point can be accepted to modify this field. The DraftDocumentationActCosts (536871185) is a decimal field.
49	Execution / Close Out	Actuals	Development (A) – Actuals: Hours	A number 0 – 99999999.99 with two digits to the right of the decimal point can be accepted to modify this field. The DraftDocumentationActsHours (536871186) is a decimal field.
50	Execution / Close Out	Actuals	Development (A) – Payment Authorized Approval Dates	Select a date from the calendar editor or type a value to modify this field. DraftDocumentationPayAuthHours is a TimeStamp field. MM/DD/CCYY Edit Check: Equal/Less than Current Date. For DMAS CM Coordinator use only.
51	Execution / Close Out	Actuals	Documentation (A)– Deliverables Approval Date	Select a date from the calendar editor or type a value to modify this field. Documentation (A) is a TimeStamp field. MM/DD/CCYY Edit Check: Equal/Less than Current Date. For DMAS CM Coordinator use only.
52	Execution / Close Out	Actuals	Documentation (A) – Actuals:	A number 0 – 99999999.99 with two digits to the right of the decimal

#	Tab Name	Group Name	Field Name	Instructions/Comments
			Costs	point can be accepted to modify this field. The FinalDocumentationActCosts (536871187) is a decimal field.
53	Execution / Close Out	Actuals	Documentation (A)– Actuals: Hours	A number 0 – 99999999.99 with two digits to the right of the decimal point can be accepted to modify this field. The FinalDocumentationActsHours (536871188) is a decimal field.
54	Execution / Close Out	Actuals	Documentation (A)– Payment Authorized Approval Dates	Select a date from the calendar editor or type a value to modify this field. FinalDocumentationPayAuthDate is a TimeStamp field. MM/DD/CCYY . Edit Check: Equal/Less than Current Date. For DMAS CM Coordinator use only.
55	Execution / Close Out	Actuals	Actual Delivery Date	Select a date from the calendar editor or type a value to modify this field. Actual Delivery Date is a TimeStamp field. MM/DD/CCYY For DMAS CM Coordinator use only.
56	Execution / Close Out	Actuals	Actual Costs	A number 0 – 99999999.99 with two digits to the right of the decimal point can be accepted to modify this field. The Actual Costs is a decimal field.
57	Execution / Close Out	Actuals	Actual Hours	A number 0 – 99999999.99 with two digits to the right of the decimal point can be accepted to modify this field. The Actual Hours is a decimal field.
58	Execution / Close Out	Actuals	Estimate Info…	Click 'Estimate Info…' button to display billing summary screen shown below (1c) which displays all deliverables with approval dates, estimated costs, actual costs in hours and payment authorized dates. This screen also includes billing notes. For DMAS CM Coordinator use only.
59	Execution / Close Out	Actuals	Estimate Info… - Billing Notes	When the diary icon shown on the right side of the 'Billing Notes' is

#	Tab Name	Group Name	Field Name	Instructions/Comments
				clicked, FCM:ISR Screen shown below (1c) is displayed. This allows previous Billing Notes to be seen under 'Diary History'. Additional notes can also be made through 'Diary Editor' by DMAS CM Coordinator. 'Billing Notes' (536871224) is a diary field and can contain up to 32,000 characters. *Note: <u>All entries</u> are stored under 'Diary History' with day, date, time, & user ID of person making the entry.*
60	Execution / Close Out	-	ISR Notes	When the diary icon shown of the 'ISR Notes' is clicked, FCM:ISR Screen shown below (1d) is displayed. This allows previous ISR Notes to be seen under 'Diary History'. ISRNotes (536870940) is a diary field and can contain up to 32,000 characters. *Note: <u>All entries</u> are stored under 'Diary History' with day, date, time, & user ID of person making the entry.*
61	Execution / Close Out	Production Verification	DMAS Signoff Name	Type letters, numbers, symbols or keywords or choose an option from the FCM:MNU:Personnel:DMASSignoff menu to modify this field. DMAS Signoff Name a character field and can contain up to 50 characters.For DMAS CM Coordinator use only.
62	Execution / Close Out	Production Verification	User Signoff Date	Select a date from the calendar editor or type a value to modify this field. User Signoff Date is a TimeStamp field. MM/DD/CCYY . Edit Check: Equal/Less than Current Date. For DMAS CM Coordinator use only.
63	Execution / Close Out	Signoff / Closeout	DMAS Analyst Name	Type letters, numbers, symbols or keywords or choose an option from the

#	Tab Name	Group Name	Field Name	Instructions/Comments
				FCM:MNU:Personnel:DMASAnalyst menu to modify this field. DMAS Analyst Name is a character field and can contain up to 50 characters.
64	Execution / Close Out	Signoff / Closeout	Analyst Signoff Date	Select a date from the calendar editor or type a value to modify this field. Analyst Signoff Date is a TimeStamp field. MM/DD/CCYY Edit Check: Equal/Less than Current Date. For DMAS CM Coordinator use only.
65	Execution / Close Out	Signoff / Closeout	Close Date	Select a date from the calendar editor or type a value to modify this field. Close Date is a TimeStamp field. MM/DD/CCYY Edit Check: Equal/Less than Current Date. For DMAS CM Coordinator use only.

1a.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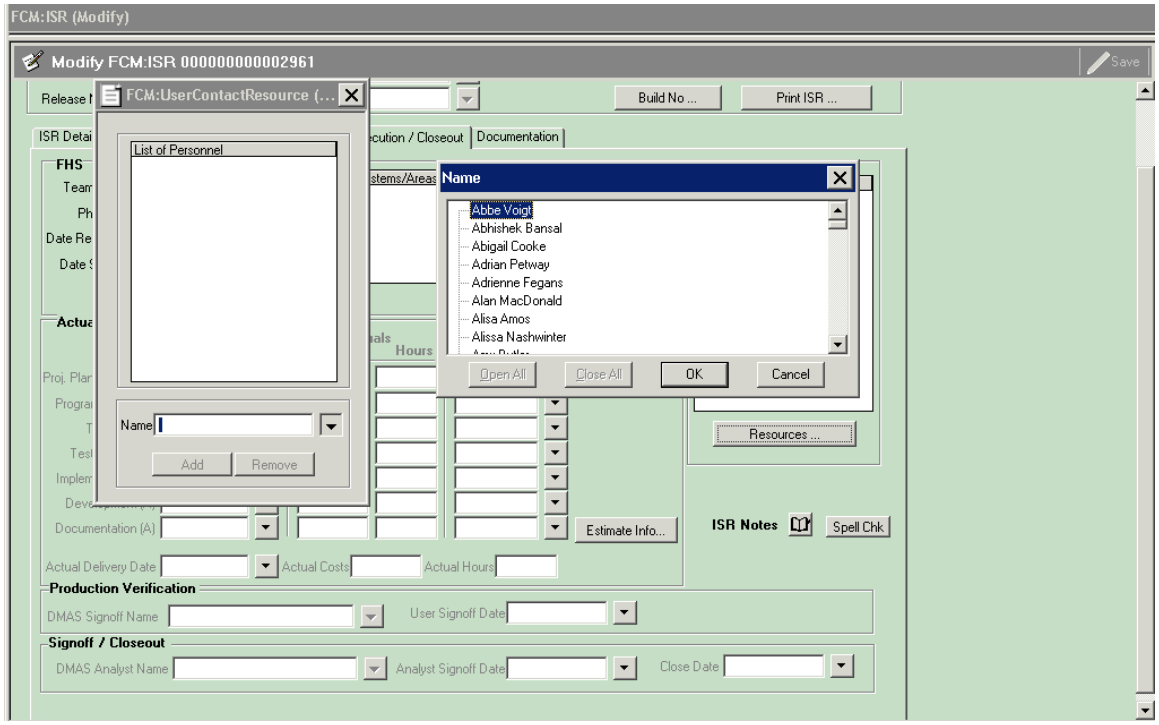
ISR Number 1997-118-001-M
ISR Type Emergency Work Order - EWO
ISR Title (R) Consumer Directed Care (Phase 01)
Spell Chk
ISR Status Approved
Release No.
Prev Release No.
Build No ...
Print ISR ...
ISR Details
Reviews / Estimates
Execution
FHS
Team Lead Ramona Sublett
Phone (L) 804-273-6780
Date Received
Date Started
Actuals
Deliverables Approval Dates
Proj. Planning Pckge
Program Specs (A) 12/16/1999
Test Plan (A) 12/16/1999
Test Results (A) 12/16/1999
Implementation (A) 12/16/1999
Development (A)
Documentation (A)
Actual Delivery Date 12/16/1999
Production Verification
DMAS Signoff Name Ramona Sublett
User Signoff Date 12/13/1999
Signoff / Closeout
DMAS Analyst Name
Analyst Signoff Date
Close Date
FCM:ISR_ImpactedSubSystems (ric2kax2)
ISR Number 1997-118-001-M
Platform MMIS
Date Started
Subsystem Claims
DMAS Signoffs
Action Completed By
Approved By
Date
FHS Signoffs
Completed By
Unit Test Signoff
System Test Signoff
Final Signoff
Migrated By Bill Lippy
Save Changes

1b.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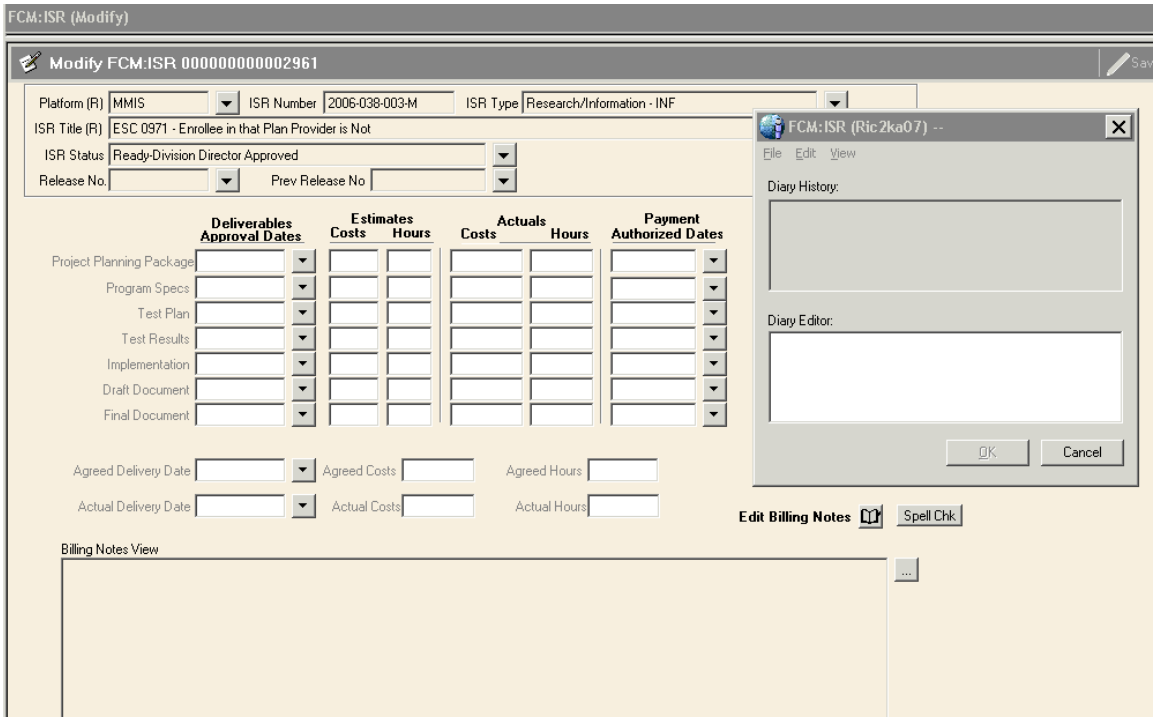
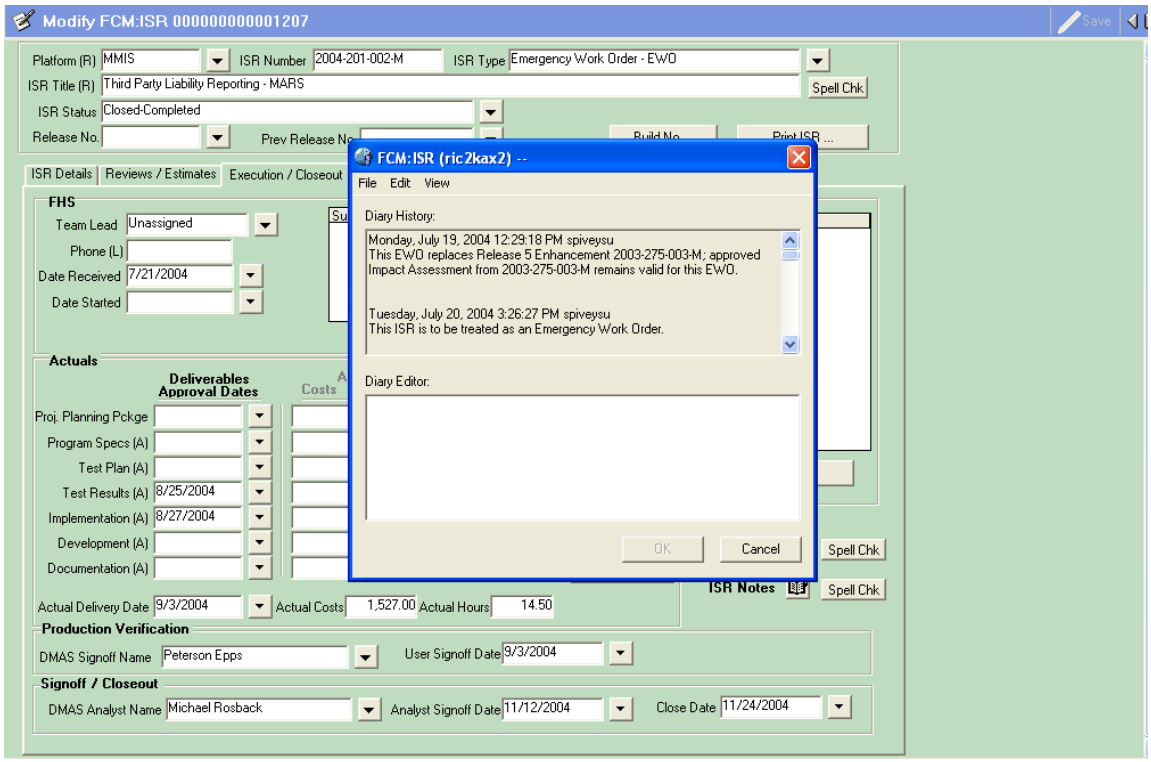
Modify FCM:ISR 000000000002961
Save
Build No ...
Print ISR ...
FCM:UserContactResource (...
List of Personnel
Name
Add
Remove
Name
Abbe Voigt
Abhishek Bansal
Abigail Cooke
Adrian Petway
Adrienne Fegans
Alan MacDonald
Alisa Amos
Alissa Nashwinter
Open All
Close All
OK
Cancel
Resources ...
Estimate Info...
ISR Notes
Spell Chk
Documentation
FHS
Actuals
Hours
Documentation (A)
Actual Delivery Date
Actual Costs
Actual Hours
Production Verification
DMAS Signoff Name
User Signoff Date
Signoff / Closeout
DMAS Analyst Name
Analyst Signoff Date
Close Date

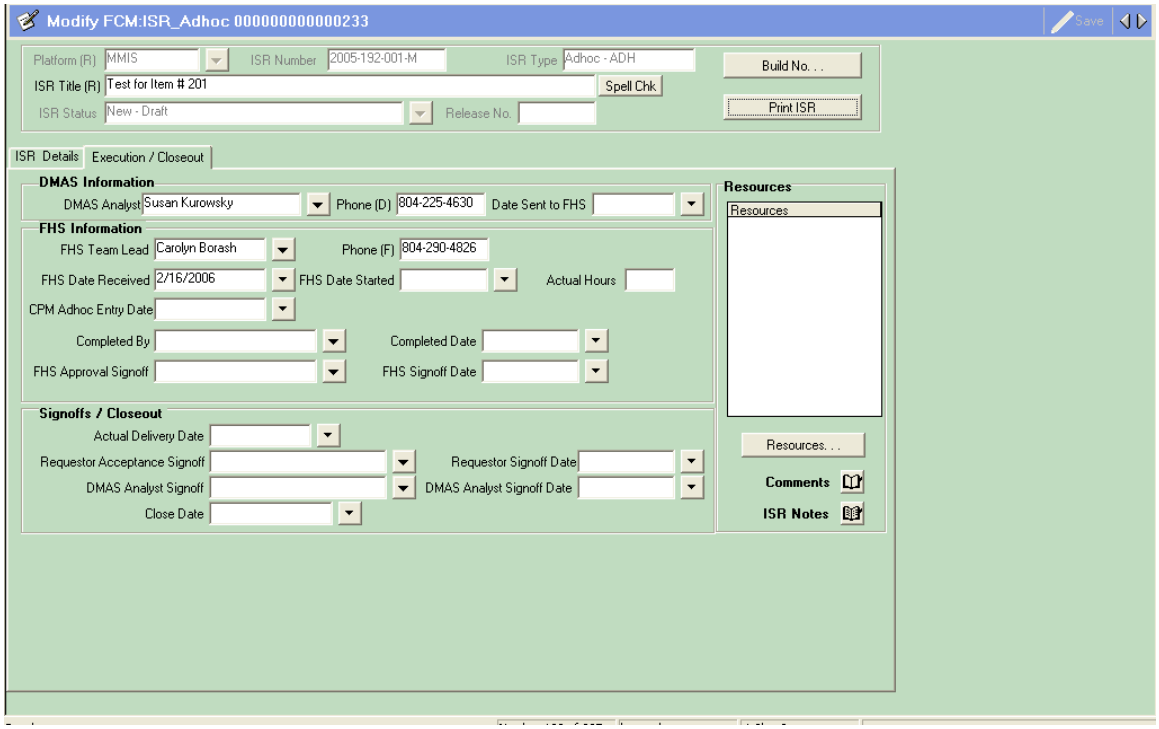
1c.


FCM:ISR (Modify)
Modify FCM:ISR 000000000002961
Platform (R) MMIS
ISR Number 2006-038-003-M
ISR Type Research/Information - INF
ISR Title (R) ESC 0971 - Enrollee in that Plan Provider is Not
ISR Status Ready-Division Director Approved
Release No.
Prev Release No
Deliverables Approval Dates
Estimates Costs Hours
Actuals Costs Hours
Payment Authorized Dates
Project Planning Package
Program Specs
Test Plan
Test Results
Implementation
Draft Document
Final Document
Agreed Delivery Date
Agreed Costs
Agreed Hours
Actual Delivery Date
Actual Costs
Actual Hours
Edit Billing Notes
Spell Chk
Billing Notes View
FCM:ISR (Ric2ka07) --
File Edit View
Diary History:
Diary Editor:
OK
Cancel

1d.


Modify FCM:ISR 000000000001207
Platform (R) MMIS
ISR Number 2004-201-002-M
ISR Type Emergency Work Order - EWO
ISR Title (R) Third Party Liability Reporting - MARS
Spell Chk
ISR Status Closed-Completed
Release No.
Prev Release No
Build No
Print ISR ...
ISR Details
Reviews / Estimates
Execution / Closeout
FHS
Team Lead Unassigned
Phone (L)
Date Received 7/21/2004
Date Started
Actuals
Deliverables Approval Dates
Proj. Planning Pckge
Program Specs (A)
Test Plan (A)
Test Results (A) 8/25/2004
Implementation (A) 8/27/2004
Development (A)
Documentation (A)
Actual Delivery Date 9/3/2004
Actual Costs 1,527.00
Actual Hours 14.50
ISR Notes
Spell Chk
Production Verification
DMAS Signoff Name Peterson Epps
User Signoff Date 9/3/2004
Signoff / Closeout
DMAS Analyst Name Michael Rosback
Analyst Signoff Date 11/12/2004
Close Date 11/24/2004
FCM:ISR (ric2kax2) --
File Edit View
Diary History:
Monday, July 19, 2004 12:29:18 PM spiveysu
This EWO replaces Release 5 Enhancement 2003-275-003-M; approved
Impact Assessment from 2003-275-003-M remains valid for this EWO.
Tuesday, July 20, 2004 3:26:27 PM spiveysu
This ISR is to be treated as an Emergency Work Order.
Diary Editor:
OK
Cancel

Execution/Closeout for Adhoc



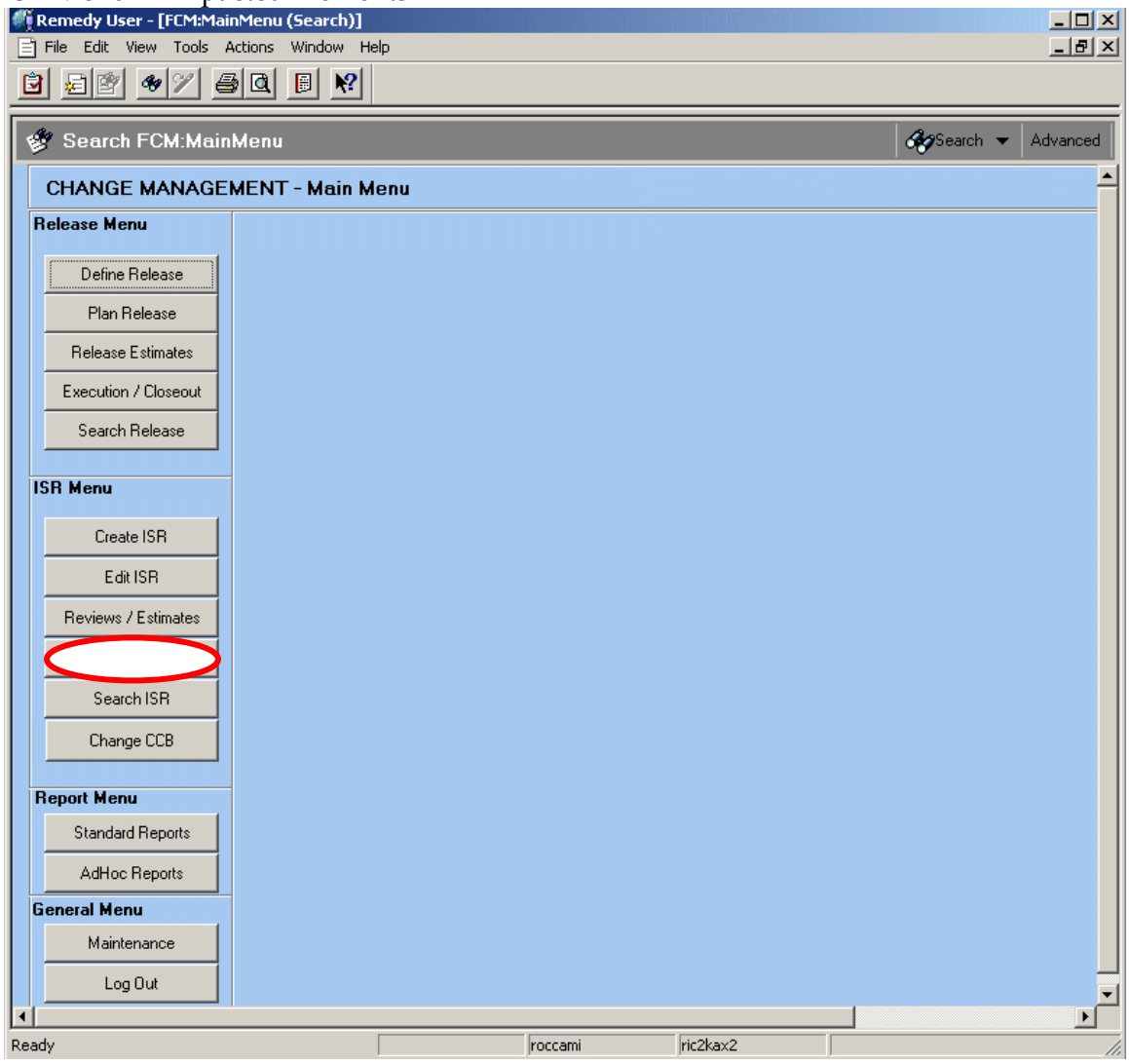
1	Execution / Close Out	DMAS Information	DMAS Analyst	Type letters, numbers, symbols or keywords or choose an option from the FCM:MNU:Personnel:DMASAnalyst menu to modify this field. DMAS Analyst is a character field and can contain up to 50 characters.
2	Execution / Close Out	DMAS Information	Phone (D)	Phone number can be accepted or pulled from the FCM:Personnel. The Phone (D) field can contain 15 characters. For DMAS CM Coordinator use only.
3	Execution / Close Out	DMAS Information	Date Sent to FHS	Select a date from the calendar editor or type a value to modify this field. Date Sent to FHS is a TimeStamp field. MM/DD/CCYY . Edit Check: Equal/Less than Current Date. For DMAS CM Coordinator use only.
4	Execution / Close Out	FHS Information	FHS Team Lead	Type letters, numbers, symbols or keywords or choose an option from the FCM:MNU:Personnel:FHSTeamLead

				menu to modify this field. FHS Team Lead is a character field and can contain up to 50 characters.
5	Execution / Close Out	FHS Information	Phone (F)	Phone number can be accepted or pulled from the FCM:Personnel. The Phone (F) field can contain 15 characters.
6	Execution / Close Out	FHS Information	FHS Date Received	Select a date from the calendar editor or type a value to modify this field. FHS Date Received is a TimeStamp field. MM/DD/CCYY Edit Check: Equal/Less than Current Date.
7	Execution / Close Out	FHS Information	FHS Date Started	Select a date from the calendar editor or type a value to modify this field. FHS Date Started is a TimeStamp field. MM/DD/CCYY
8	Execution / Close Out	FHS Information	Actual Hours	A number can be accepted between 0 and 2,147,483,647 to modify the field. Actual Hours is an Integer field.
9	Execution / Close Out	FHS Information	CPM Adhoc Entry Date	Select a date from the calendar editor or type a value to modify this field. This field is a TimeStamp field. MM/DD/CCYY
10	Execution / Close Out	FHS Information	Completed By	Type letters, numbers, symbols or keywords or choose an option from the FCM:MNU:Personnel:FHSTeamLead menu to modify this field. Completed By is a character field and can contain up to 50 characters.
11	Execution / Close Out	FHS Information	Completed Date	Select a date from the calendar editor or type a value to modify this field. Completed Date is a TimeStamp field. MM/DD/CCYY.
12	Execution / Close Out	FHS Information	FHS Approval Signoff	Type letters, numbers, symbols or keywords or choose an option from the FCM:MNU:Personnel:FHSTeamLead menu to modify this field. FHS Approval Signoff is a character field and can contain up to 50 characters.
13	Execution / Close Out	FHS Information	FHS Signoff Date	Select a date from the calendar editor or type a value to modify this field. FHS Signoff Date is a TimeStamp field. MM/DD/CCYY
14	Execution/	Resources	Resources	FCM:UserContactResources screen

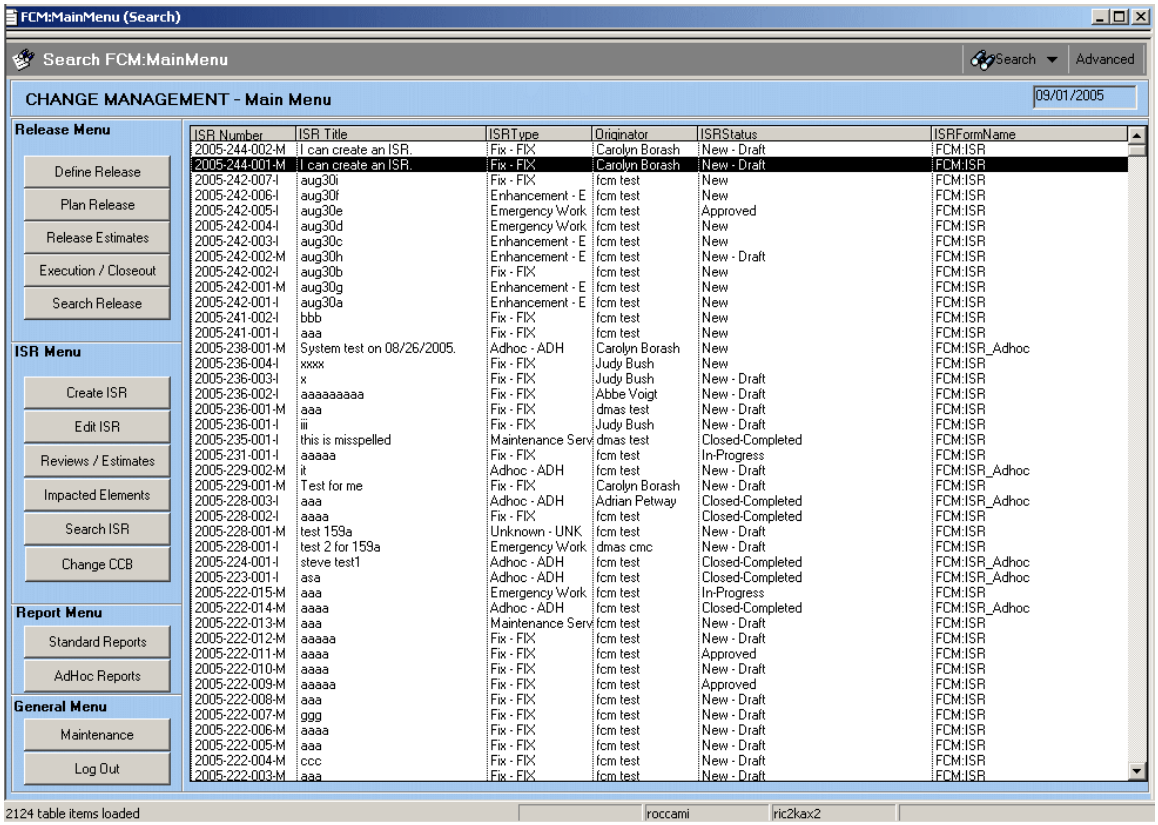
	Closeout			shown below (1b) is displayed when 'Resources' button is clicked. This dialog form is used to connect "Resources" to an ISR. It fills the table fields on the related ISR when the ISR is displayed or saved. Walk table logic is used to store the data on the ISR. When drop down button next to the name field is clicked, a name is highlighted and clicked 'O.K', then that name will be displayed on the Name field. When name is displayed in the name field and the 'Add' button is clicked' then the name will be added to the 'List of Personnel' table. When a name in 'List of Personnel' field is double clicked, it is displayed in the name field. When 'Remove' button is clicked, the name will be deleted from the 'List of Personnel' table. (1c) For First Health CM Coordinator use only.
15	Execution / Close Out	Signoff/ Closeout	Actual Delivery Date	Select a date from the calendar editor or type a value to modify this field. Actual Delivery Date is a TimeStamp field. MM/DD/CCYY For DMAS CM Coordinator use only.
16	Execution / Close Out	Signoff/ Closeout	Requestor Acceptance Signoff	Type letters, numbers, symbols or keywords or choose an option from the FCM:MNU:Personnel:OriginatorADH menu to modify this field. Requestor Acceptance Signoff is a character field and can contain up to 50 characters. For DMAS CM Coordinator use only.
17	Execution / Close Out	Signoff/ Closeout	Requestor Signoff Date	Select a date from the calendar editor or type a value to modify this field. Requestor Signoff Date is a TimeStamp field. MM/DD/CCYY eck: Equal/Less than Current Date. For DMAS CM Coordinator use only.
18	Execution / Close Out	Signoff/ Closeout	DMAS Analyst Signoff	Type letters, numbers, symbols or keywords or choose an option from the

				FCM:MNU:Personnel:DMASAnalyst menu to modify this field. DMAS Analyst Signoff is a character field and can contain up to 50 characters.
19	Execution / Close Out	Signoff/ Closeout	DMAS Analyst Signoff Date	Select a date from the calendar editor or type a value to modify this field. DMAS Analyst Signoff Date is a TimeStamp field. MM/DD/CCYY Edit Check: Equal/Less than Current Date. For DMAS CM Coordinator use only.
20	Execution / Close Out	Signoff/ Closeout	Close Date	Select a date from the calendar editor or type a value to modify this field. Close Date is a TimeStamp field. MM/DD/CCYY Edit Check: Equal/Less than Current Date. For DMAS CM Coordinator use only.
21	Execution / Close Out	-	Comments	When the diary icon shown of the 'ISR Notes' is clicked, FCM:ISR_Adhoc Screen shown below (1d) is displayed. This allows previous ISR Notes to be seen under 'Diary History'. Comments (536871078) is a diary field and can contain up to 32,000 characters. *Note: <u>All entries</u> are stored under 'Diary History' with day, date, time, & user ID of person making the entry.*
22	Execution / Close Out	-	ISR Notes	When the diary icon shown of the 'ISR Notes' is clicked, FCM:ISR_Adhoc Screen shown below 1d is displayed. This allows previous ISR Notes to be seen under 'Diary History'. ISRNotes (536871110) is a diary field and can contain up to 32,000 characters. *Note: <u>All entries</u> are stored under 'Diary History' with day, date, time, & user ID of person making the entry.*

ISR Menu – 'Impacted Elements'

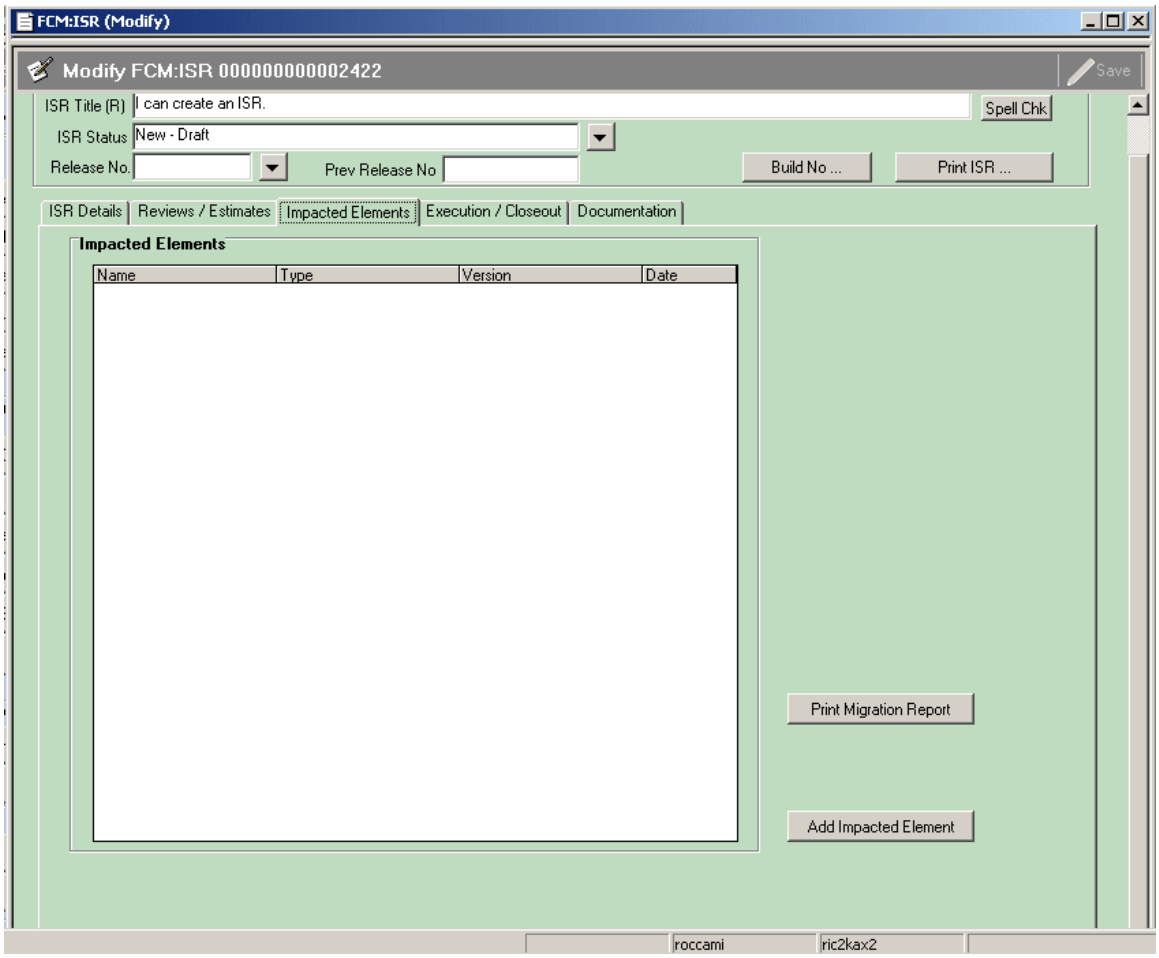


- 'Impacted Elements' is a shortcut to the position at the 'Impacted Elements' tab which contains information on the identified Configuration Items (CI) / elements impacted by the ISR. This is accessible and can be viewed by all users but only FHS CM Coordinator can update this information.
- Click on 'Impacted Elements' option under 'ISR Menu' and the screen shown below is displayed.

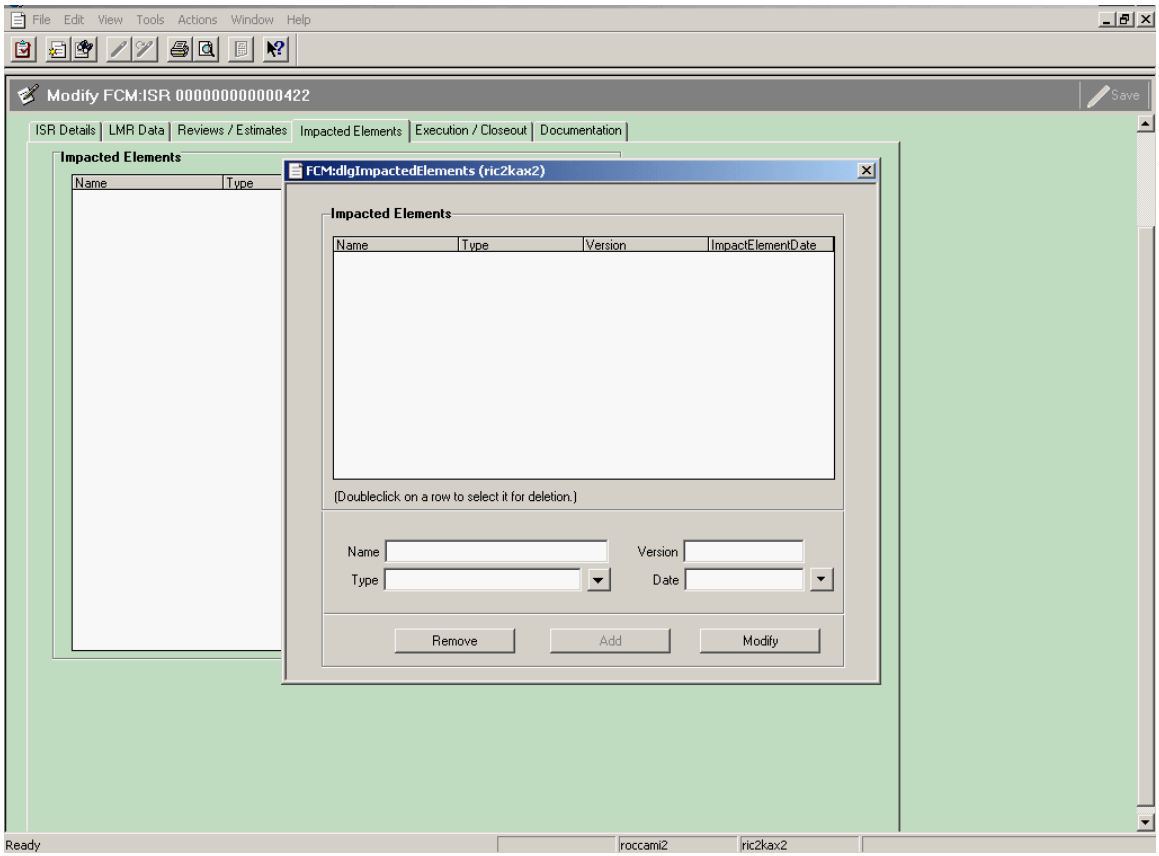

FCM:MainMenu (Search)
Search FCM:MainMenu
Search
Advanced
CHANGE MANAGEMENT - Main Menu
09/01/2005
Release Menu
Define Release
Plan Release
Release Estimates
Execution / Closeout
Search Release
ISR Menu
Create ISR
Edit ISR
Reviews / Estimates
Impacted Elements
Search ISR
Change CCB
Report Menu
Standard Reports
AdHoc Reports
General Menu
Maintenance
Log Out
ISR Number | ISR Title | ISRType | Originator | ISRStatus | ISRFormName
2005-244-002-M | I can create an ISR. | Fix - FIX | Carolyn Borash | New - Draft | FCM:ISR
2005-244-001-M | I can create an ISR. | Fix - FIX | Carolyn Borash | New - Draft | FCM:ISR
2005-242-007-I | aug30i | Fix - FIX | fcm test | New | FCM:ISR
2005-242-006-I | aug30f | Enhancement - E | fcm test | New | FCM:ISR
2005-242-005-I | aug30e | Emergency Work | fcm test | Approved | FCM:ISR
2005-242-004-I | aug30d | Emergency Work | fcm test | New | FCM:ISR
2005-242-003-I | aug30c | Enhancement - E | fcm test | New | FCM:ISR
2005-242-002-M | aug30h | Enhancement - E | fcm test | New - Draft | FCM:ISR
2005-242-002-I | aug30b | Fix - FIX | fcm test | New | FCM:ISR
2005-242-001-M | aug30g | Enhancement - E | fcm test | New | FCM:ISR
2005-242-001-I | aug30a | Enhancement - E | fcm test | New | FCM:ISR
2005-241-002-I | bbb | Fix - FIX | fcm test | New | FCM:ISR
2005-241-001-I | aaa | Fix - FIX | fcm test | New | FCM:ISR
2005-238-001-M | System test on 08/26/2005. | Adhoc - ADH | Carolyn Borash | New | FCM:ISR_Adhoc
2005-236-004-I | xxxx | Fix - FIX | Judy Bush | New | FCM:ISR
2005-236-003-I | x | Fix - FIX | Judy Bush | New - Draft | FCM:ISR
2005-236-002-I | aaaaaaaaa | Fix - FIX | Abbe Voigt | New - Draft | FCM:ISR
2005-236-001-M | aaa | Fix - FIX | dmas test | New - Draft | FCM:ISR
2005-236-001-I | iii | Fix - FIX | Judy Bush | New - Draft | FCM:ISR
2005-235-001-I | this is misspelled | Maintenance Serv | dmas test | Closed-Completed | FCM:ISR
2005-231-001-I | aaaaa | Fix - FIX | fcm test | In-Progress | FCM:ISR
2005-229-002-M | it | Adhoc - ADH | fcm test | New - Draft | FCM:ISR_Adhoc
2005-229-001-M | Test for me | Fix - FIX | Carolyn Borash | New - Draft | FCM:ISR
2005-228-003-I | aaa | Adhoc - ADH | Adrian Petway | Closed-Completed | FCM:ISR_Adhoc
2005-228-002-I | aaaa | Fix - FIX | fcm test | Closed-Completed | FCM:ISR
2005-228-001-M | test 159a | Unknown - UNK | fcm test | New - Draft | FCM:ISR
2005-228-001-I | test 2 for 159a | Emergency Work | dmas cmc | New - Draft | FCM:ISR
2005-224-001-I | steve test1 | Adhoc - ADH | fcm test | Closed-Completed | FCM:ISR_Adhoc
2005-223-001-I | asa | Adhoc - ADH | fcm test | Closed-Completed | FCM:ISR_Adhoc
2005-222-015-M | aaa | Emergency Work | fcm test | In-Progress | FCM:ISR
2005-222-014-M | aaaa | Adhoc - ADH | fcm test | Closed-Completed | FCM:ISR_Adhoc
2005-222-013-M | aaa | Maintenance Serv | fcm test | New - Draft | FCM:ISR
2005-222-012-M | aaaaa | Fix - FIX | fcm test | New - Draft | FCM:ISR
2005-222-011-M | aaaa | Fix - FIX | fcm test | Approved | FCM:ISR
2005-222-010-M | aaaa | Fix - FIX | fcm test | New - Draft | FCM:ISR
2005-222-009-M | aaaaa | Fix - FIX | fcm test | Approved | FCM:ISR
2005-222-008-M | aaa | Fix - FIX | fcm test | New - Draft | FCM:ISR
2005-222-007-M | ggg | Fix - FIX | fcm test | New - Draft | FCM:ISR
2005-222-006-M | aaaa | Fix - FIX | fcm test | New - Draft | FCM:ISR
2005-222-005-M | aaa | Fix - FIX | fcm test | New - Draft | FCM:ISR
2005-222-004-M | ccc | Fix - FIX | fcm test | New - Draft | FCM:ISR
2005-222-003-M | aaa | Fix - FIX | fcm test | New - Draft | FCM:ISR
2124 table items loaded
roccami
ric2kax2

- List of available ISRs are shown. Double-click on the 'ISR Number' to access the information for the ISR. For all ISR Types except 'ADH', screen displayed will be the one shown below.

  Note: For ISR Type 'ADH', the response would be the same as for 'Execution / Close Out' since the 'Impacted Elements' tab does not exist for it.



- Click on the 'Add Impacted Element' button and the screen displayed below will be shown. Enter the required information into the popup for all impacted elements one by one.

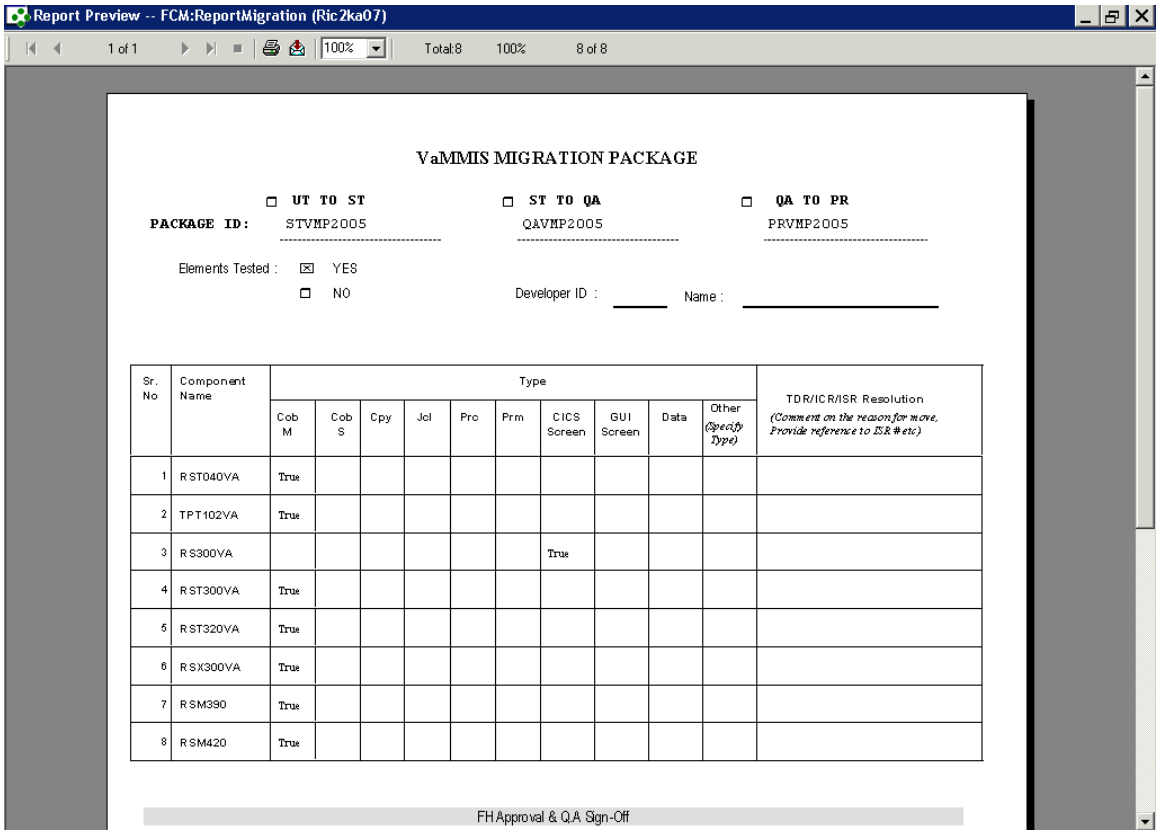


Information on the fields related to this screen is shown in the table below.

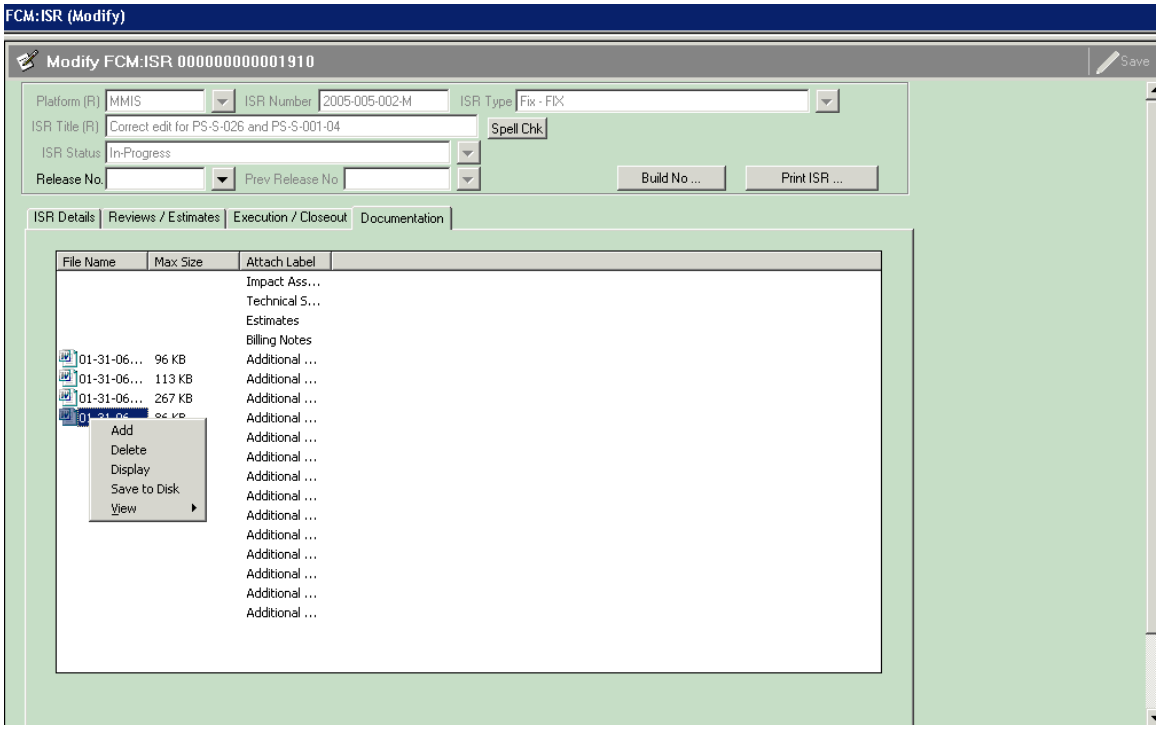
#	Tab Name	Group Name	Field Name	Instructions/Comments
1	Impacted Elements	Impacted Elements	Name	Any letters, numbers, symbols or keywords can be accepted to modify this field. Name is a character field and can contain up to 69 characters. For FHS CM Coordinator use only.
2	Impacted Elements	Impacted Elements	Type	Any letters, numbers, symbols or keywords or a selection from the drop-down can be accepted to modify this field. Type is a character field and can contain up to 69 characters. The selections are 'COBM', 'COBS', 'CPY', 'JCL', 'PRC', 'PRM', 'CICS', GUI', OR 'DATA'. For FHS CM Coordinator use only.
3	Impacted Elements	Impacted Elements	Version	Any letters, numbers, symbols or keywords can be accepted to modify this field. Version is a character field and can contain up

#	Tab Name	Group Name	Field Name	Instructions/Comments
				to 69 characters. For FHS CM Coordinator use only. Note: This can be entered whenever it is appropriate.
4	Impacted Elements	Impacted Elements	Date	Select a date from the calendar editor or type a value to modify this field. Date is a TimeStamp field. MM/DD/CCYY For FHS CM Coordinator use only. Note: This can be entered whenever it is appropriate.
5	Impacted Elements	Impacted Elements	-	When 'Remove', 'Add' or 'Modify' button is clicked, appropriate action will occur.
6	Impacted Elements	-	-	When 'Print Migration Report' button is clicked, Report Preview – FCM:ReportMigration Screen will be displayed.. (1a)

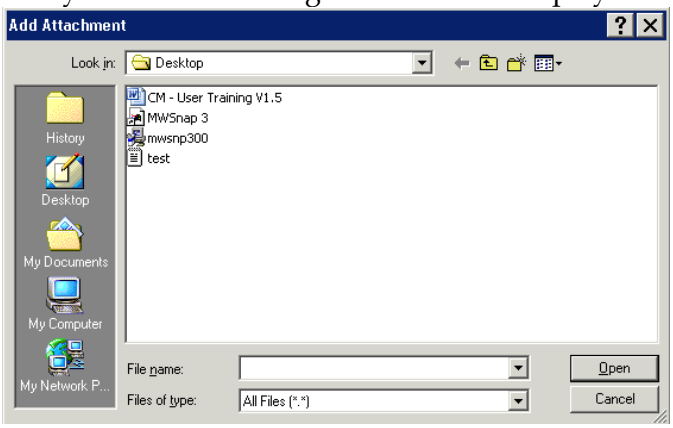
1a.



Documentation Screen



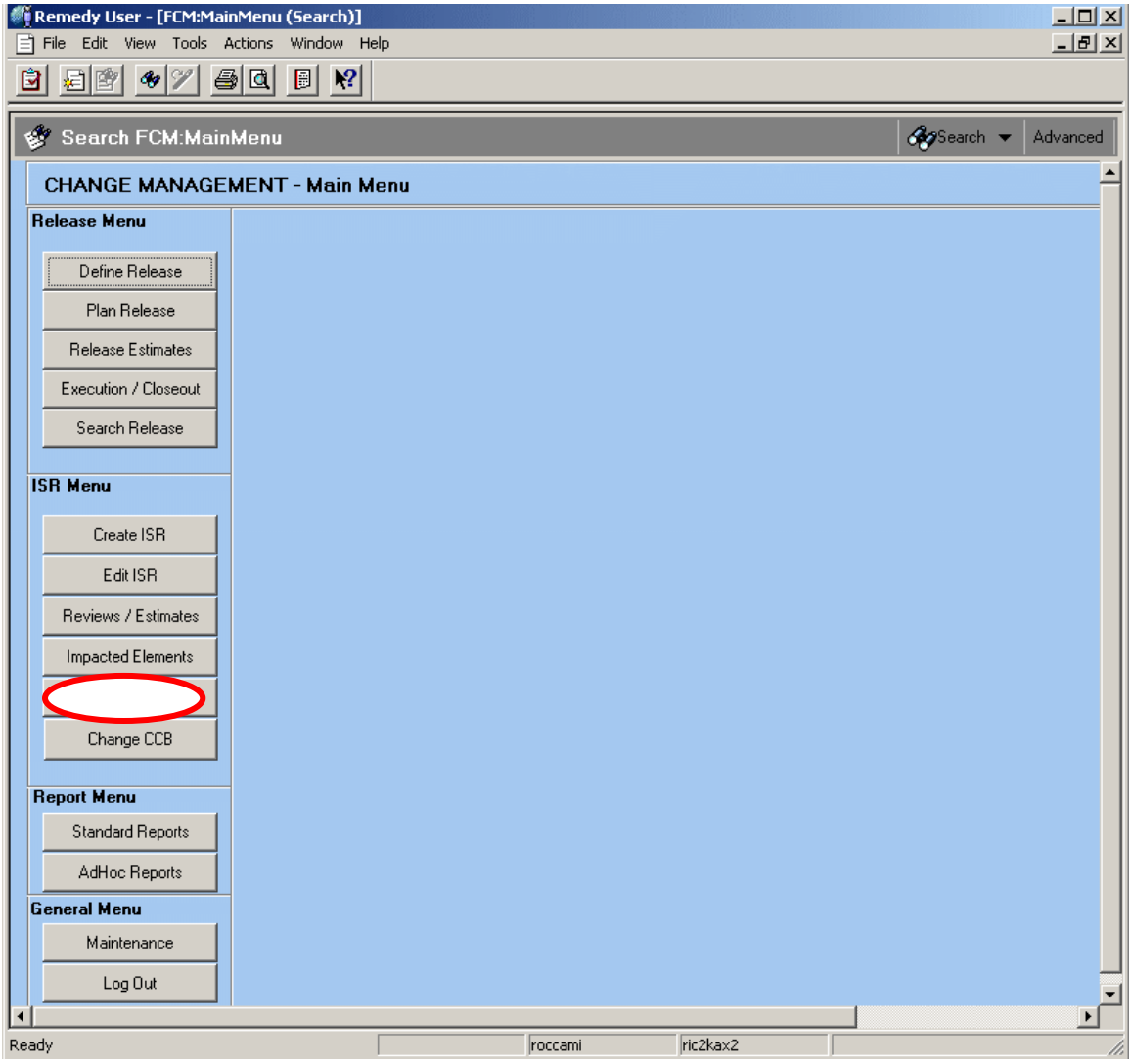
- Click on 'Documentation' tab to attach, display and delete documents stored in Remedy.
- Right click on documentation tab to display selection list which displays 'Add', 'Delete', 'Display', 'Save to Disk' and 'View' (size of icons).
- When adding a document to Remedy or saving the document from Remedy to disk/ system the following screen will be displayed.



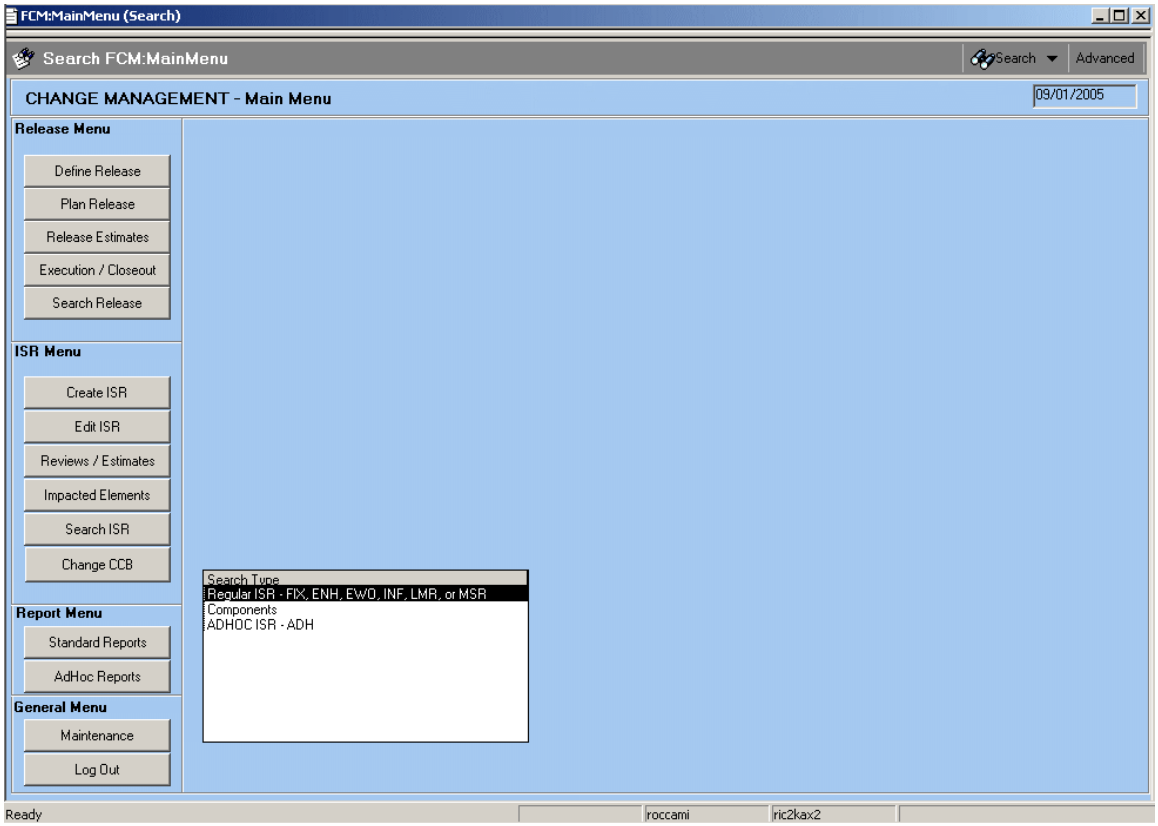
- To delete, display or view (size of icons), right click on the document and select 'Delete', 'Display' or 'View'.

NOTE: When selecting delete system automatically deletes document, user will NOT be asked if user wants to delete.

ISR Menu – 'Search ISR'

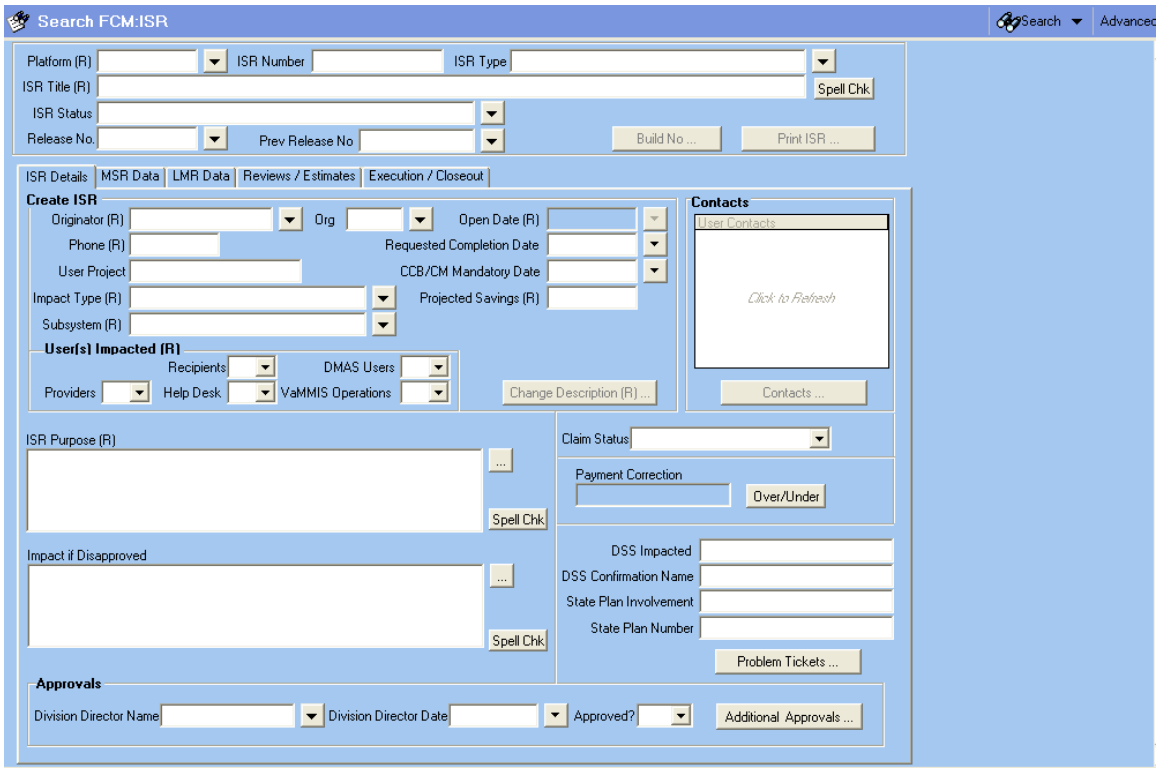


- 'Search ISR' provides the facility to search for specific ISRs. Search can be done against the majority of the ISR fields on all tabs. This facility is available to all users.
- Click on 'Search ISR' and the screen shown below is displayed.

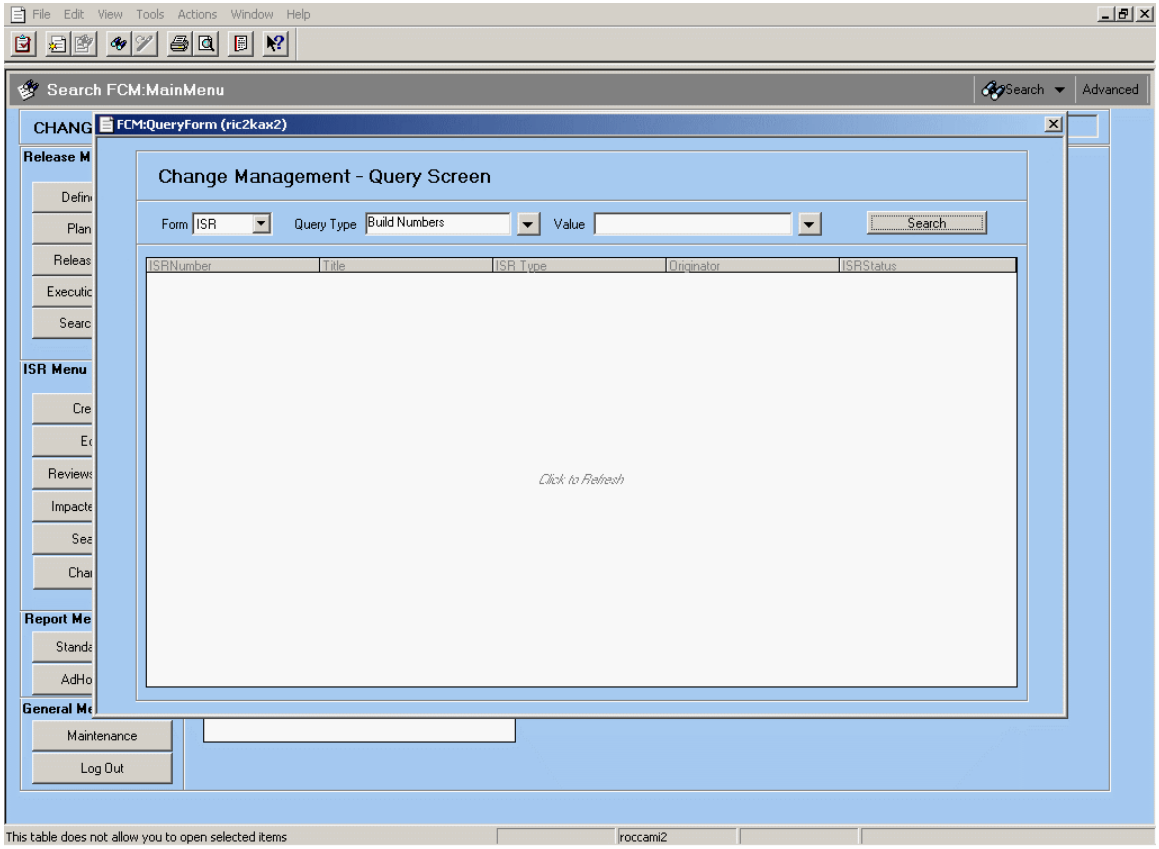


- There are 3 options for doing a Search. Select the appropriate option for which the search has to be done. The first screen shown below is for 'Regular ISR' option while the second screen is for the Components and the third screen is for the 'Adhoc ISR' option.

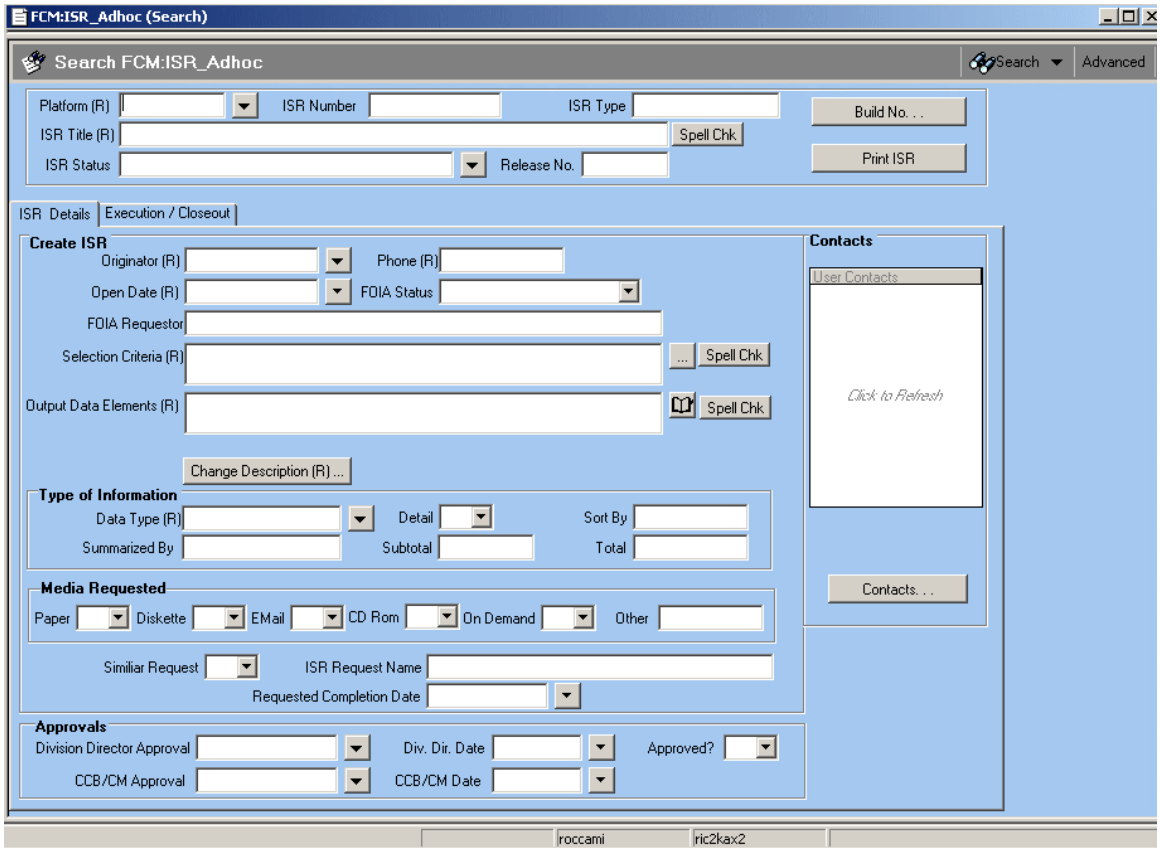
'Regular ISR' Search Screen



'Components' Search Screen



'Adhoc ISR' Search Screen

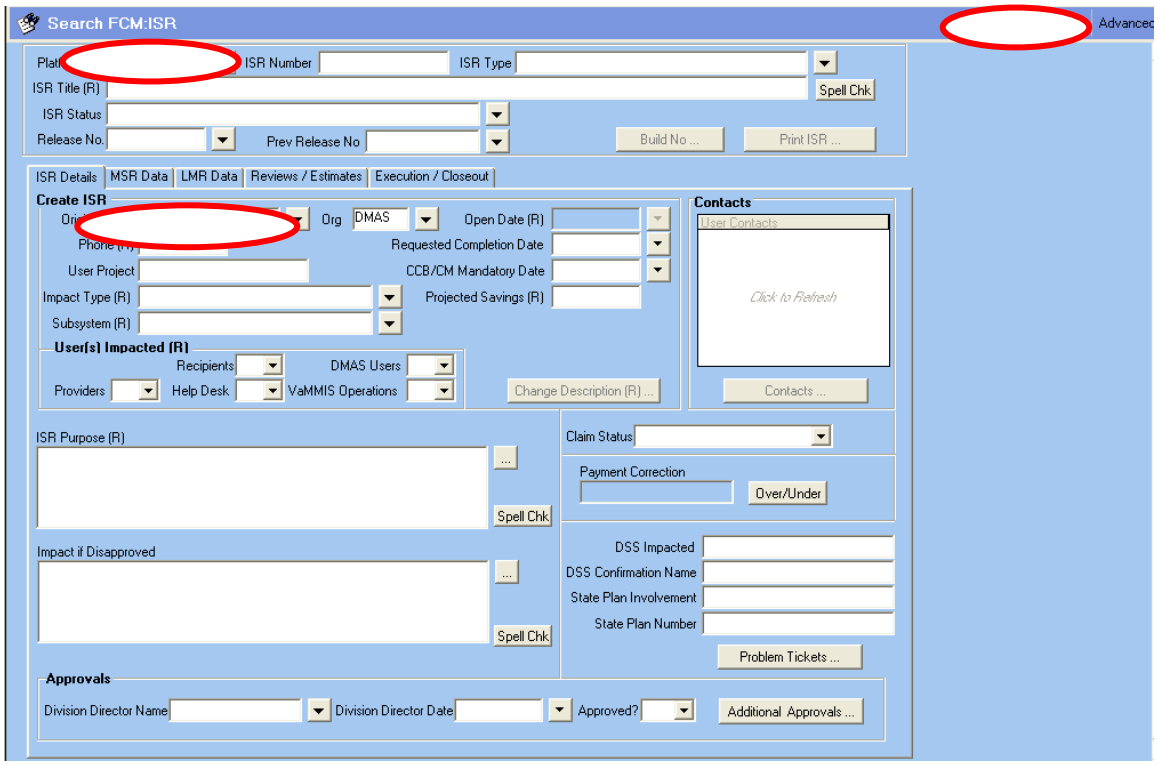


'Regular ISR' Search - Example

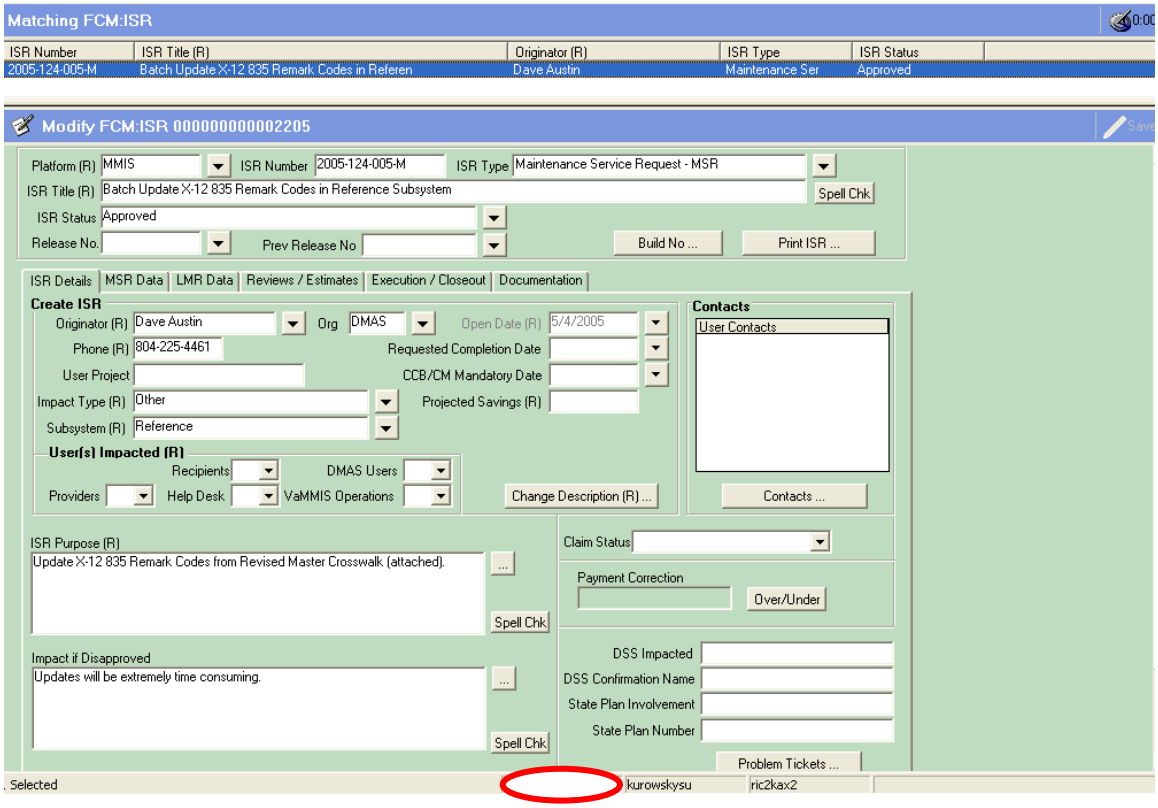
- When the required search criteria in one or more fields are entered and the 'Search' button is clicked, a query is created and executed.

  Note #1: Search criteria can be entered for any of the available fields across the following 5 tabs (ISR Details, MSR Data, LMR Data, Reviews / Estimates and Execution/Closeout).

  Note #2: Search criteria can be supplied using partial information too (eg, ISR Number specified as '2004' will return all ISRs beginning with the value of '2004').

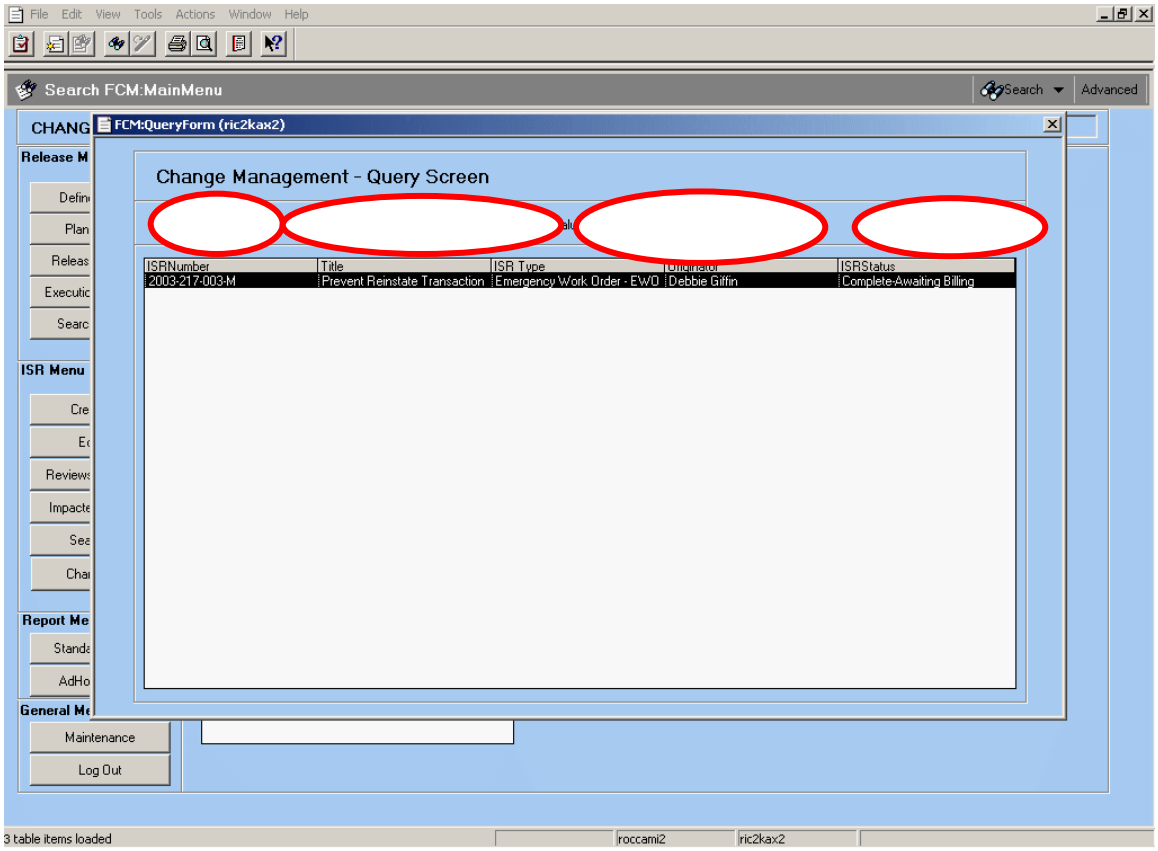


- Results of the search are displayed on a split screen as shown below. Upper frame shows the ISRs fulfilling the entered criteria while the lower frame displays the first ISR on the list. When any ISR on the list is clicked on, details of the selected ISR will be displayed.
- Number of ISRs satisfying the search will be displayed at the bottom of the screen.



'Components' Search Example

- Search criteria can be selected by any of the three fields (Form, Query Type and Value). Click on the 'Search' button on the right side of the screen to initiate the search.
- Number of ISRs satisfying the search will be displayed.
- To view the actual ISR double click on the ISR listed.

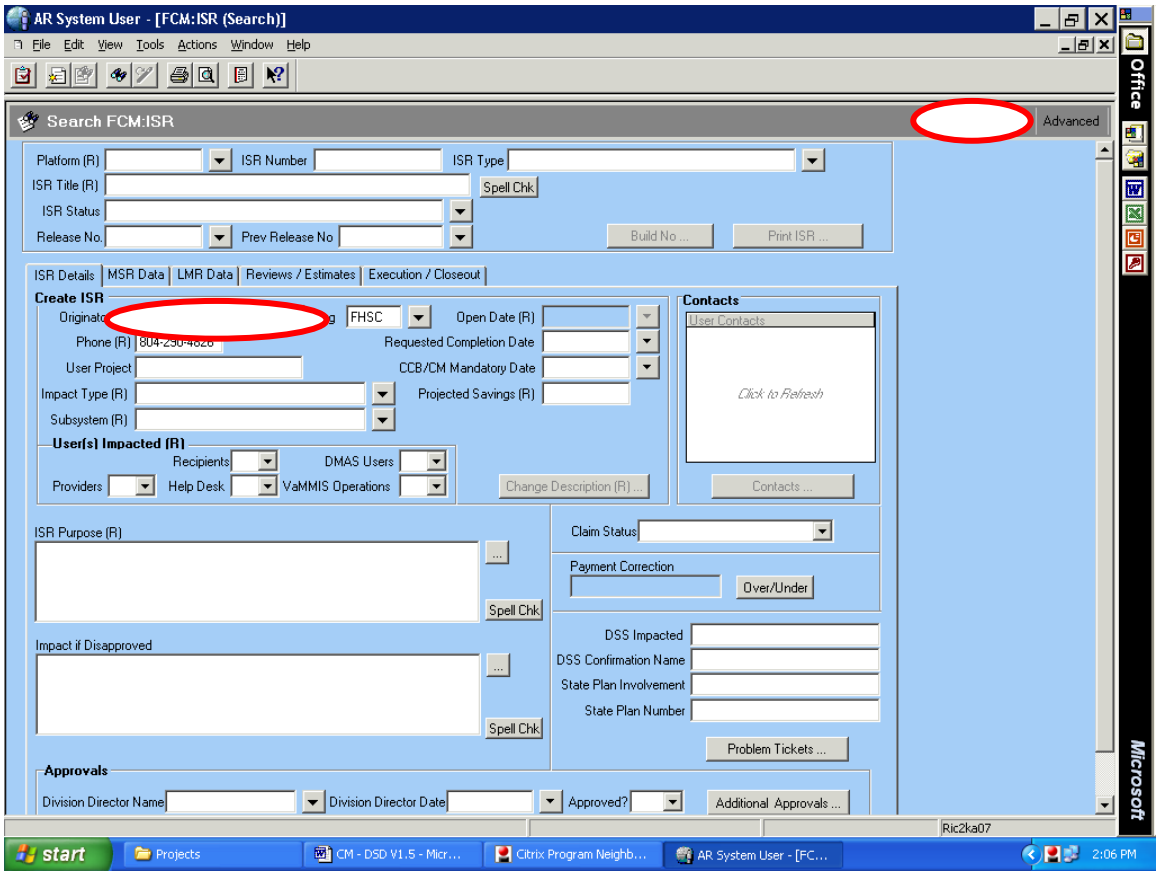


'Adhoc ISR' Search - Example

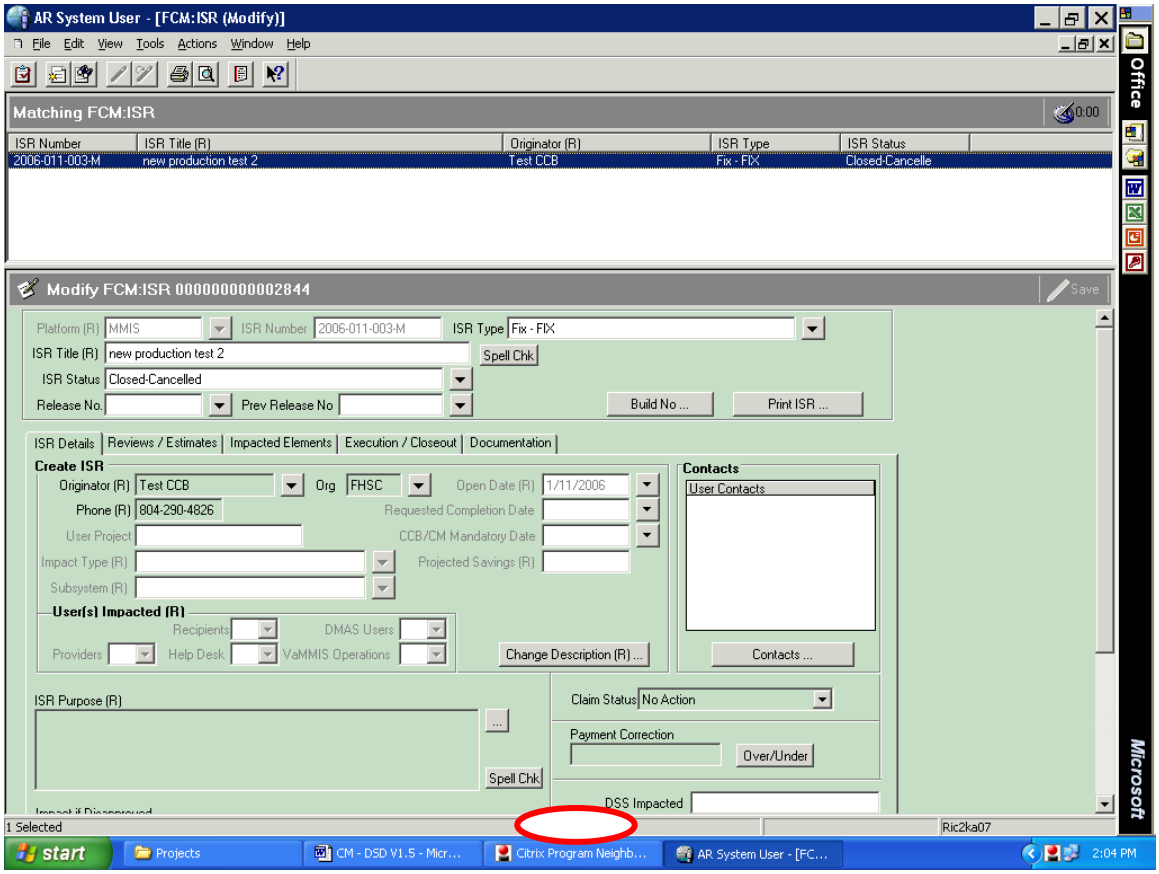
- Enter the required search criteria in one or more fields. In this example, the search criteria is to find ISR(s) having 'Originator' of 'Test CCB'. Click on 'Search' button which is towards top right corner to initiate the search.

  Note #1: Search criteria can be entered for any of the available fields across both tabs (ISR Details, Execution/Closeout).

  Note #2: Search criteria can be supplied using partial information too (eg, ISR Number specified as '2004' will return all ISRs beginning with the value of '2004').

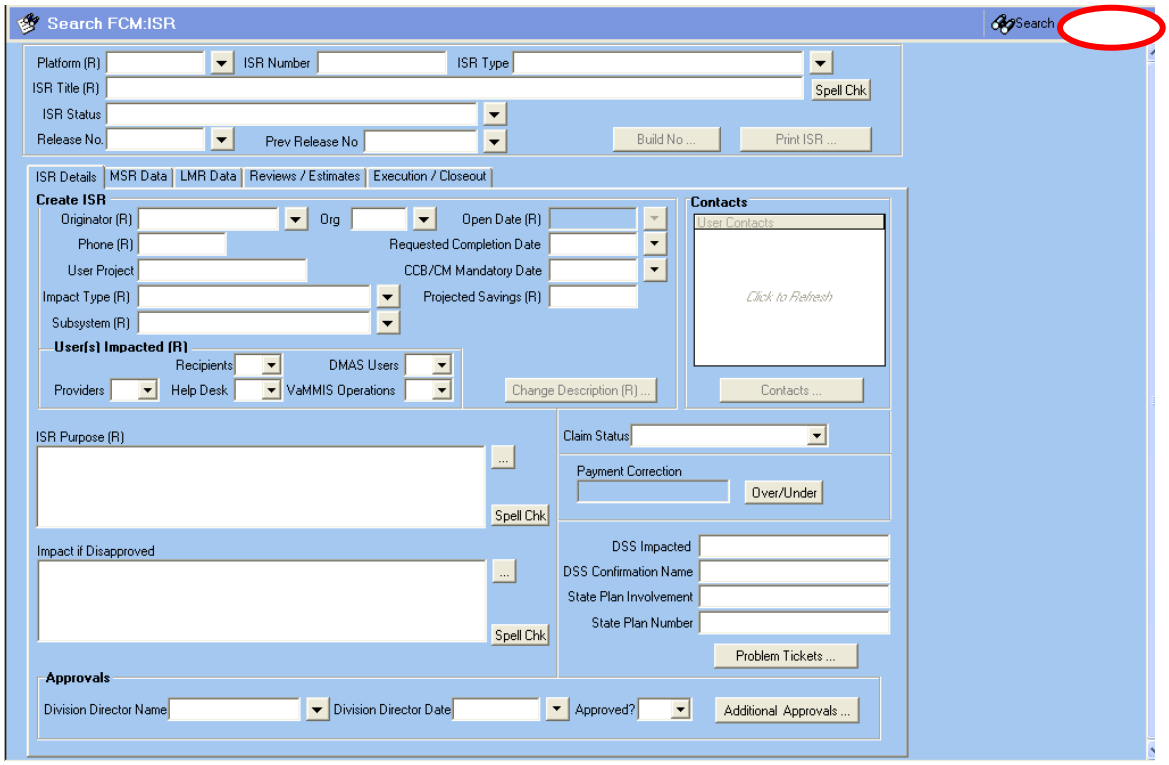


- Results of the search are displayed on a split screen as shown below. Upper frame shows the ISRs fulfilling the entered criteria while the lower frame displays the first ISR on the list. Select any ISR on the list by clicking on it and details of the selected ISR will be displayed.
- Number of ISRs satisfying the search can be found at the bottom of the screen.

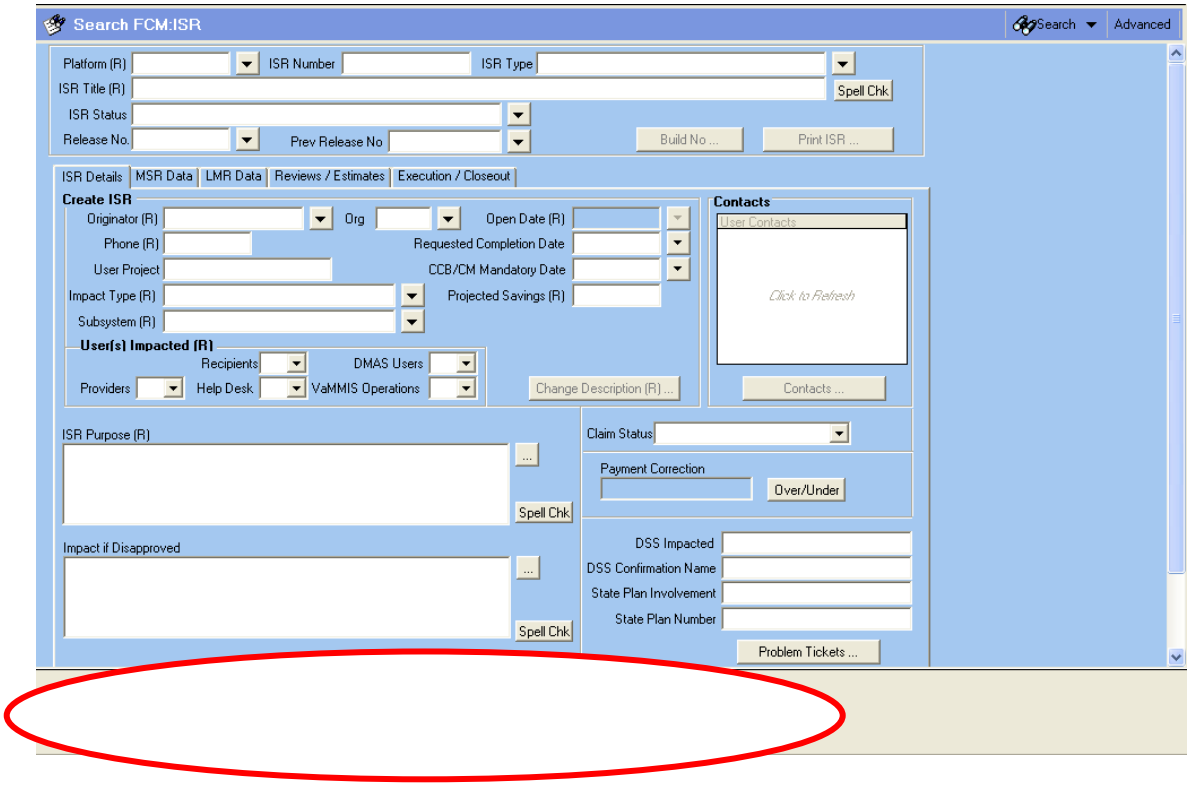


'Regular ISR' Advanced Search – Example

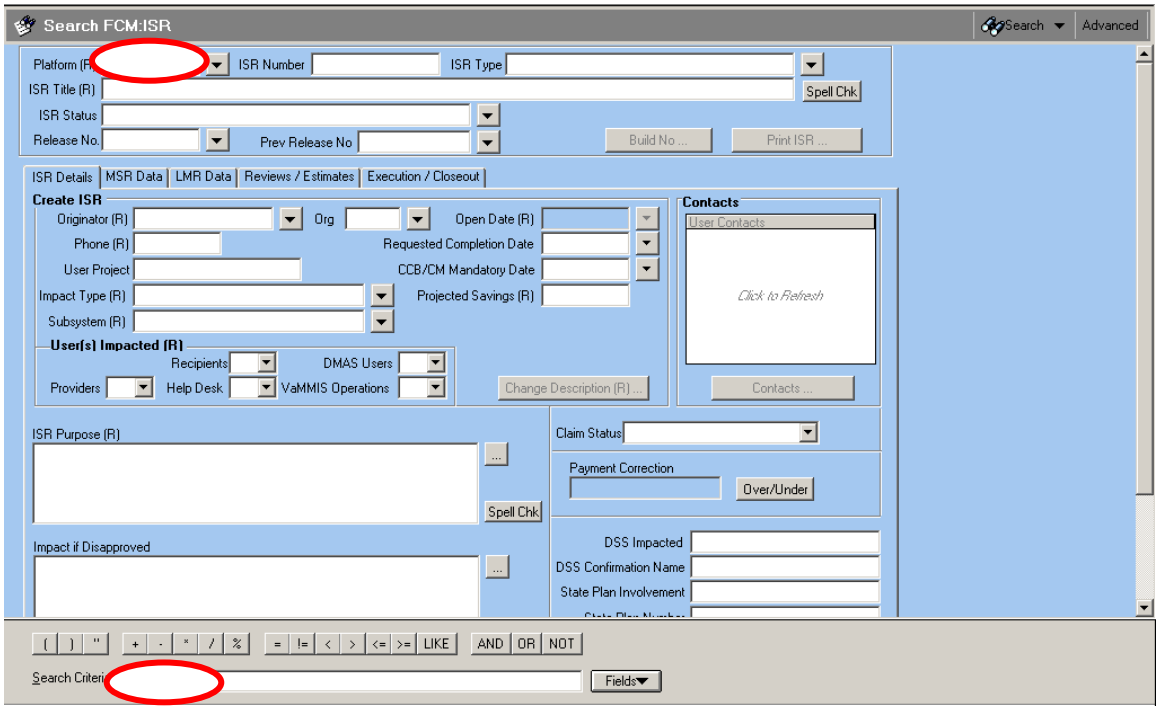
- Advanced Search function allows the user to perform more sophisticated searches for ISR(s) which satisfy required criteria.
- Click on 'Advanced' button which is towards top right corner.



- Screen shown below is displayed. A dialog box is available at the bottom of the screen to specify the search criteria.



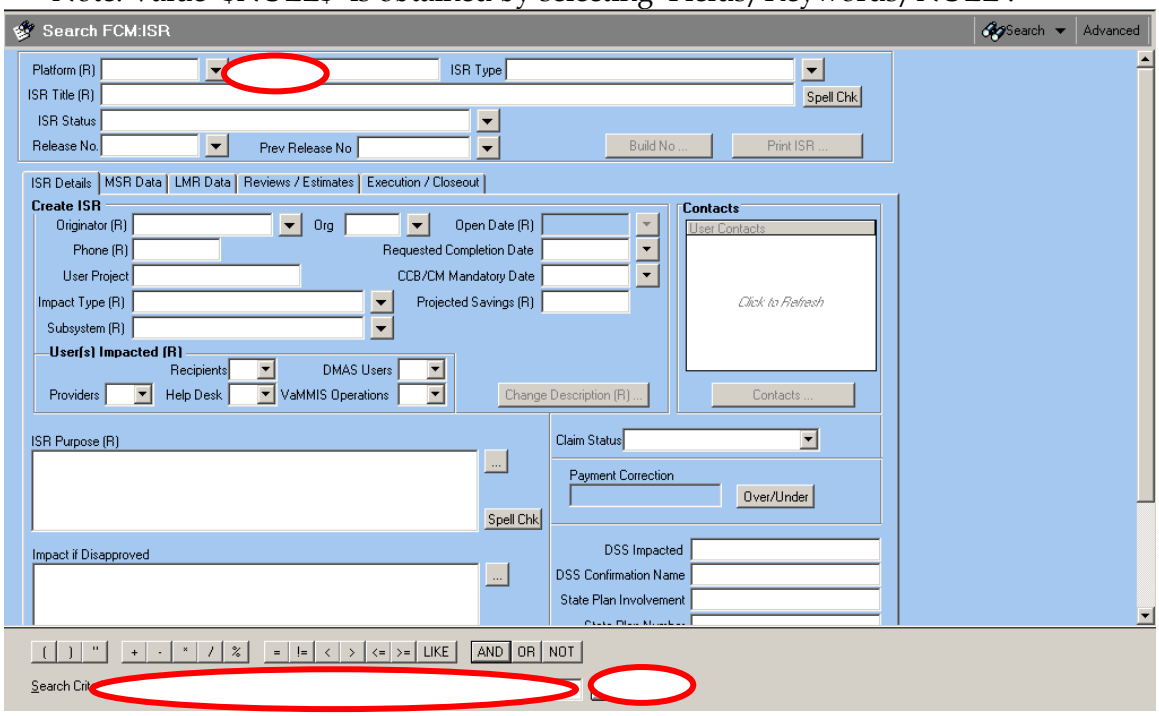
- Name of the field is entered by clicking on the label next to the field of interest (as shown on the screen below). This will automatically enter the name with the proper format in the 'Search Criteria' dialog box.

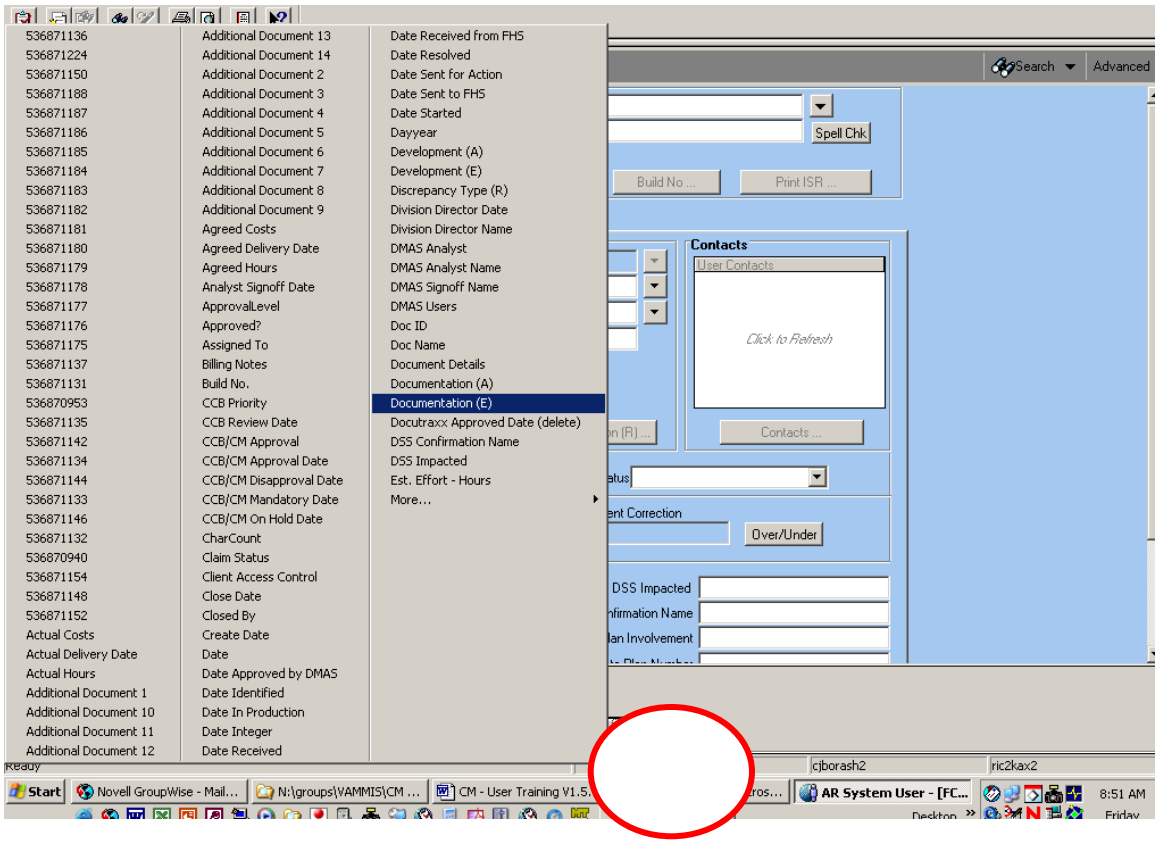


- Enter the remaining criteria by keying in the information using the toolbar above 'Search Criteria' dialog box to ensure proper format. Click on 'Search' button which is towards top right corner to initiate the search.

- Example in the 'Search Criteria' dialog box is to do a search where 'ISR Number' begins with 2003 or 2004, and 'Release Number' has a value present.

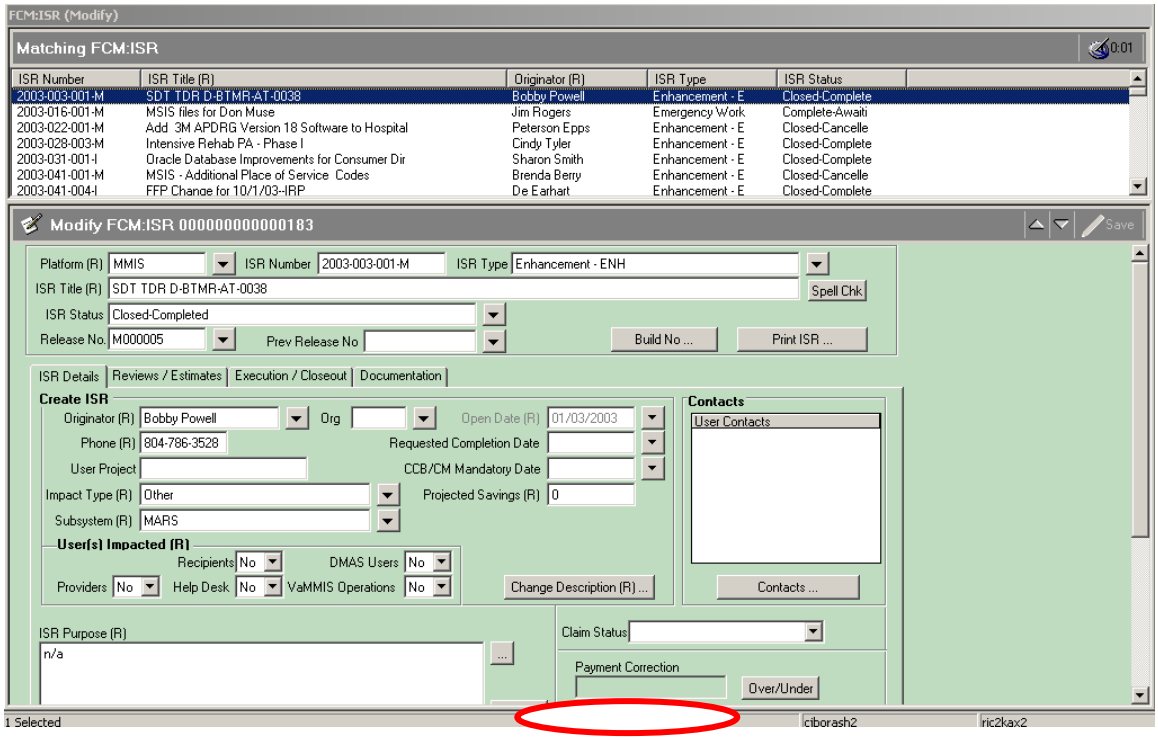
  Note: Value '$NULL$' is obtained by selecting 'Fields/Keywords/NULL'.



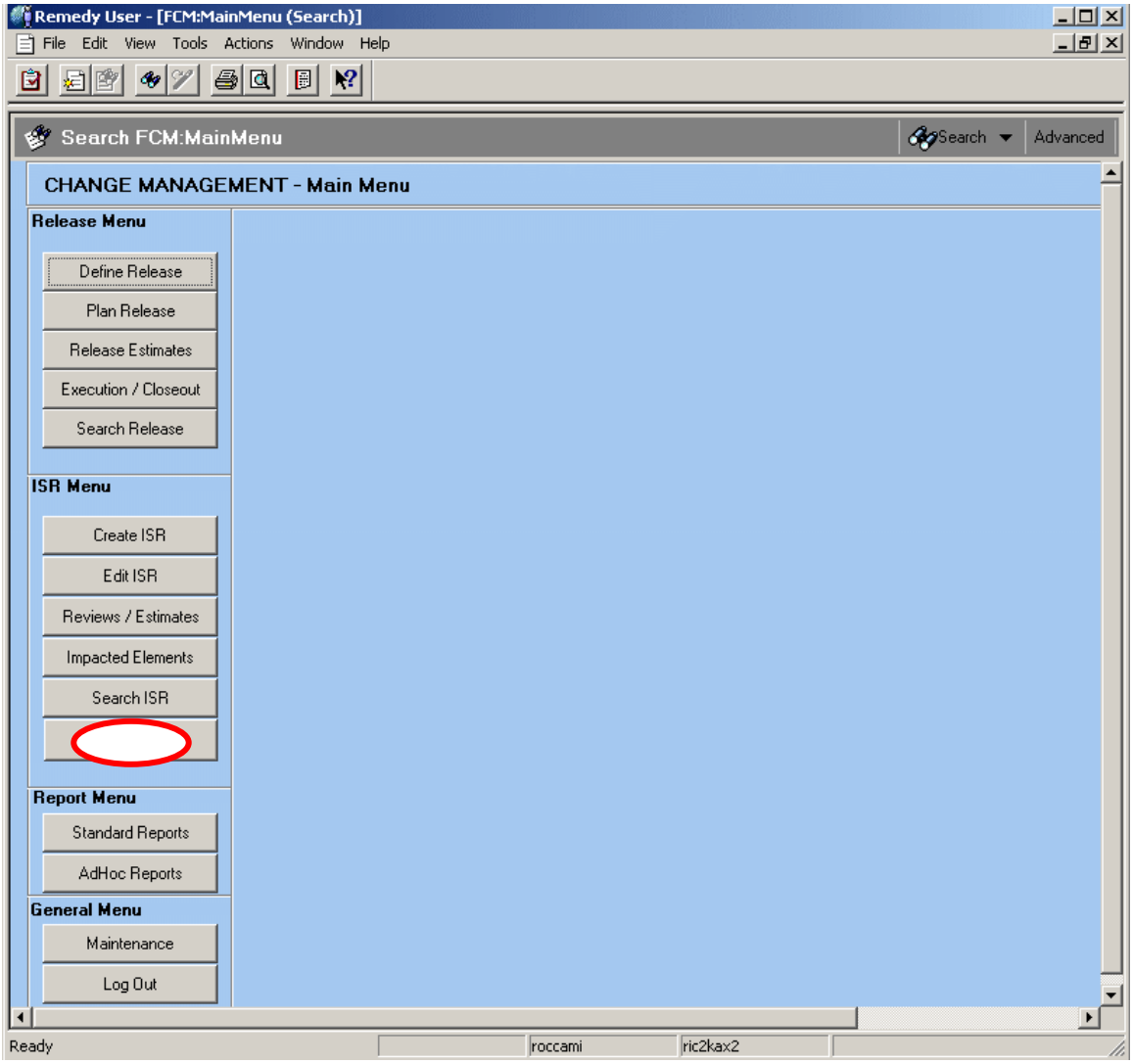


- Additional Fields, Selection Values, Keywords and Currency codes may be selected.

- Results of the search are displayed on a split screen as shown below. Upper frame shows the ISRs fulfilling the entered criteria while the lower frame displays the first ISR on the list. Select any ISR on the list by clicking on it and details of the selected ISR will be displayed.
- Number of ISRs satisfying the search can be found at the bottom of the screen.

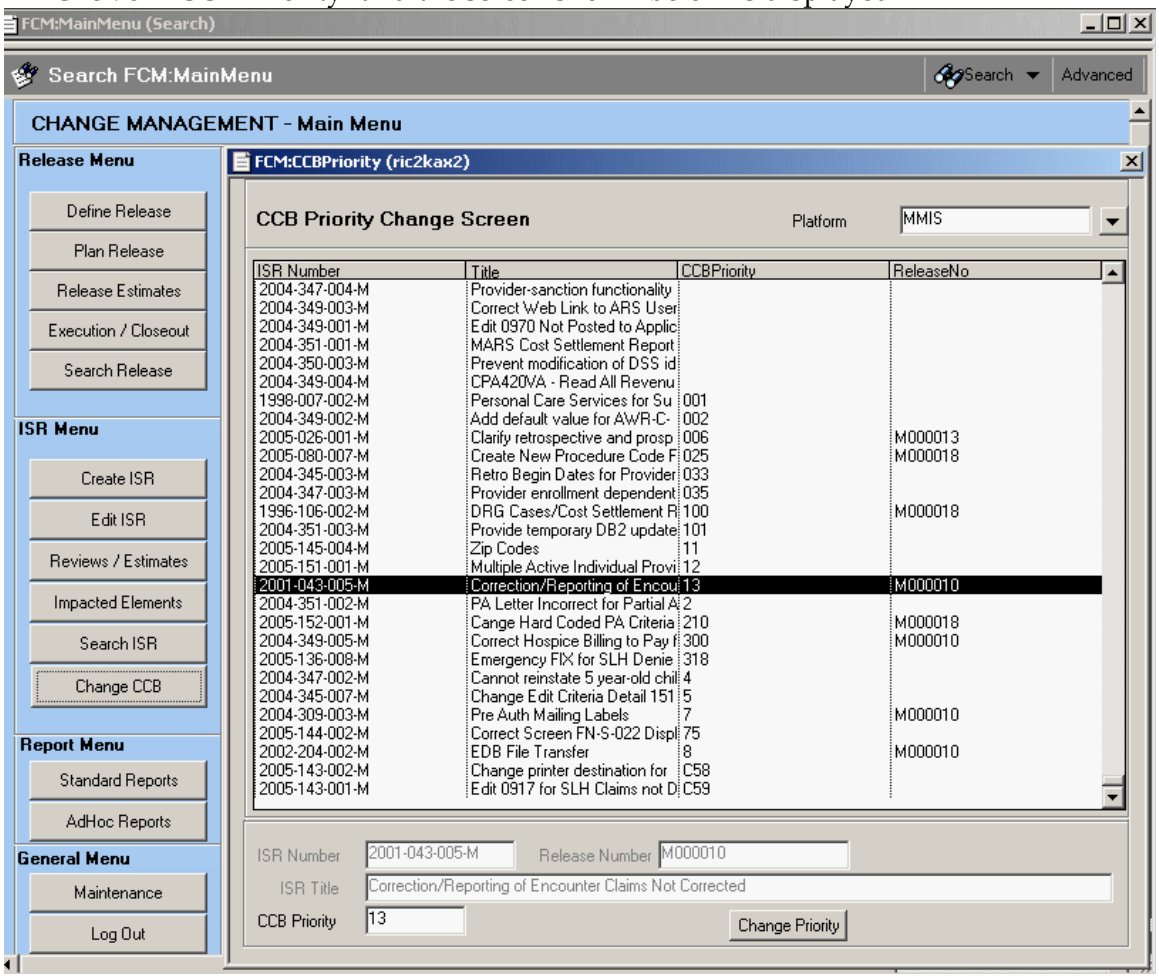


`Change CCB`



- `Change CCB` allows the DMAS CM Coordinator to change the CCB priority of an EWO.

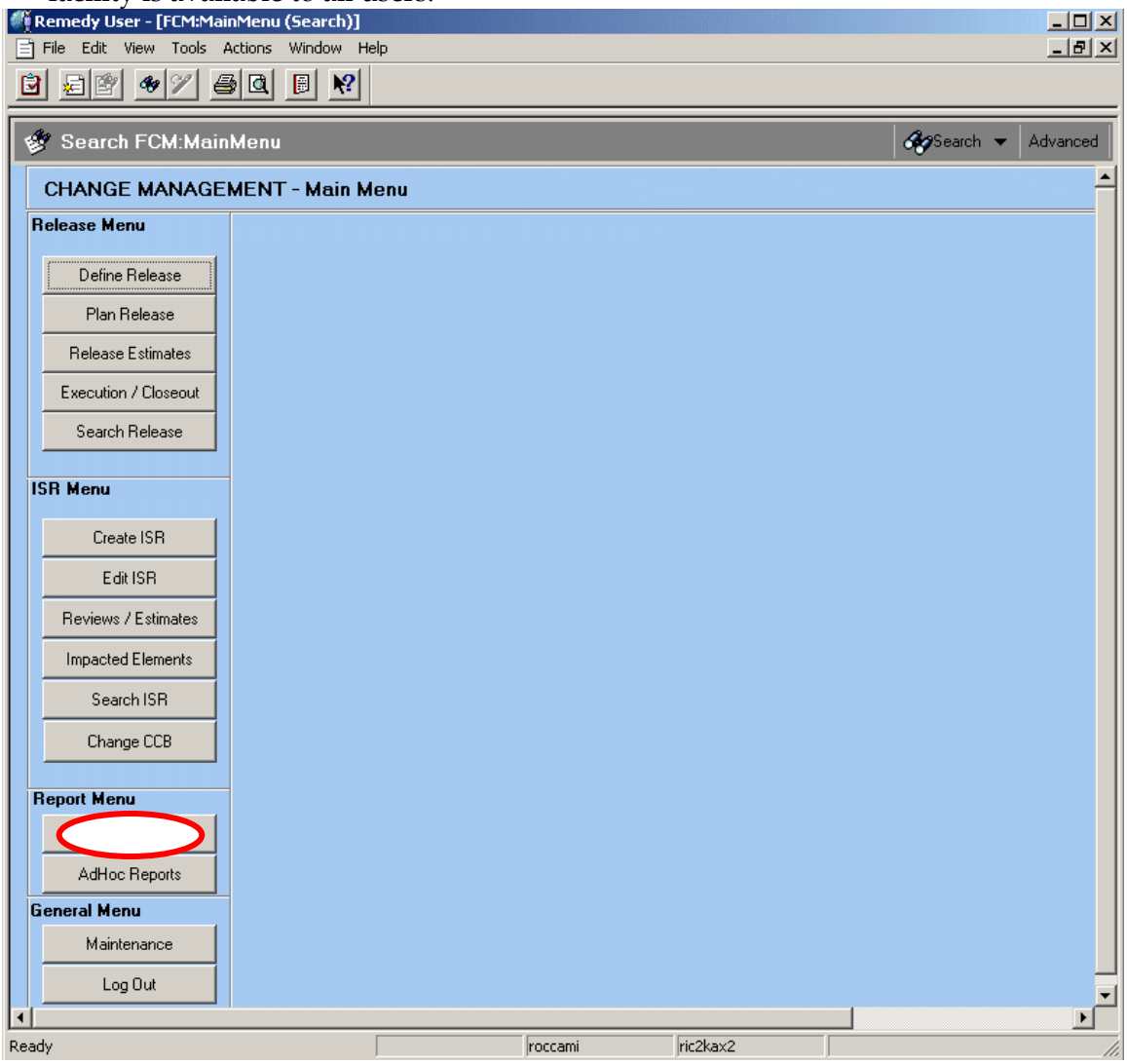
Click on `CCB Priority` and the screen shown below is displayed



- Select the appropriate Platform from dropdown list in upper right corner (IRP, MMIS or Other).
- Select ISR to be changed.
- The ISR information will appear in the fields on the bottom of the screen.
  Note: All fields will be grayed except the 'CCB Priority field' and the 'Change Priority' button.
- Change the 'CCB Priority' number and click `Change Priority`.
- The Priority of the CCB will be changed and the new Priority will be seen in the `CCB Priority` field.

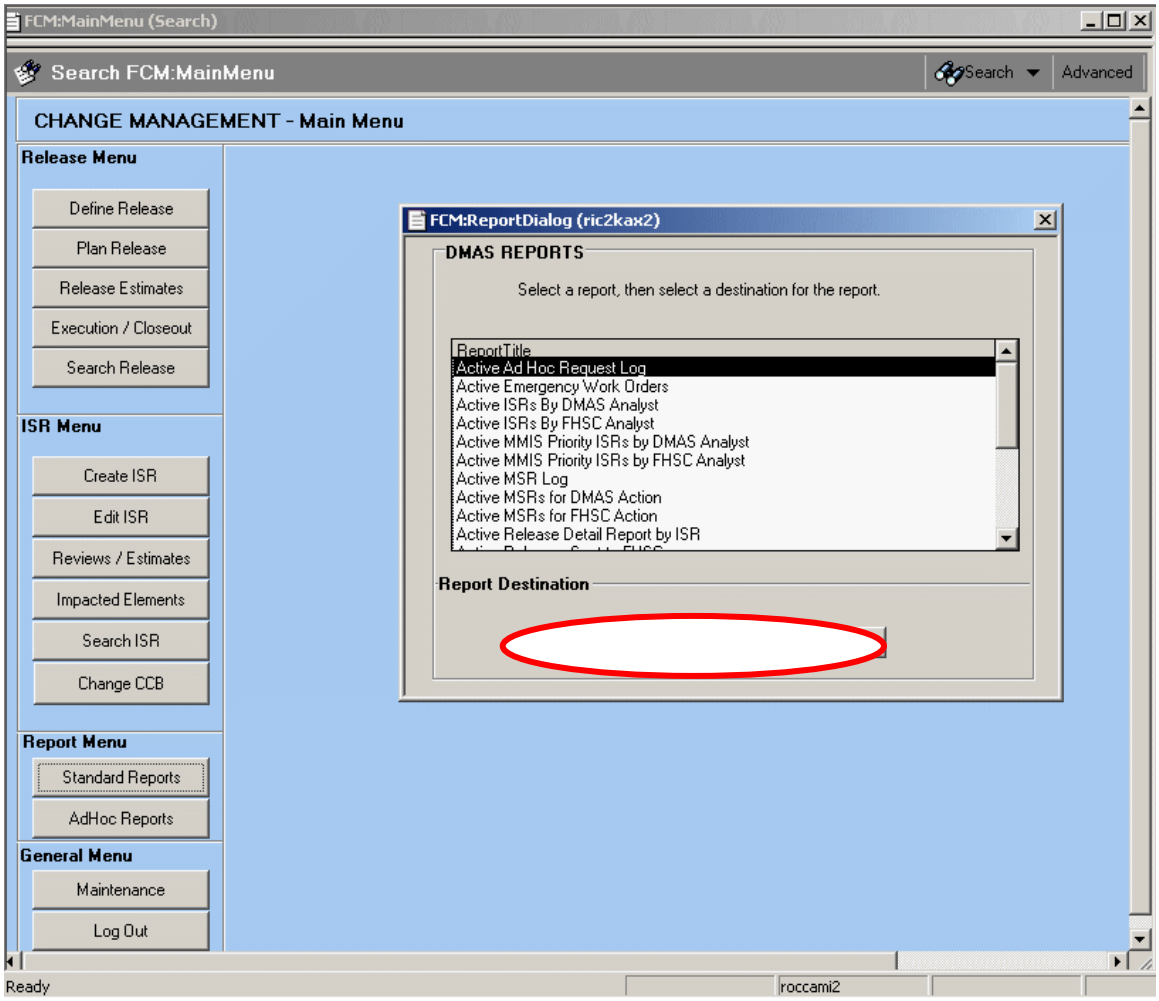
Report Menu – 'Standard Reports'

- 'Standard Reports' provides the facility to generate standard canned reports. This facility is available to all users.



View/Print Standard Report

- Click on 'Standard Reports' and the screen shown below is displayed.



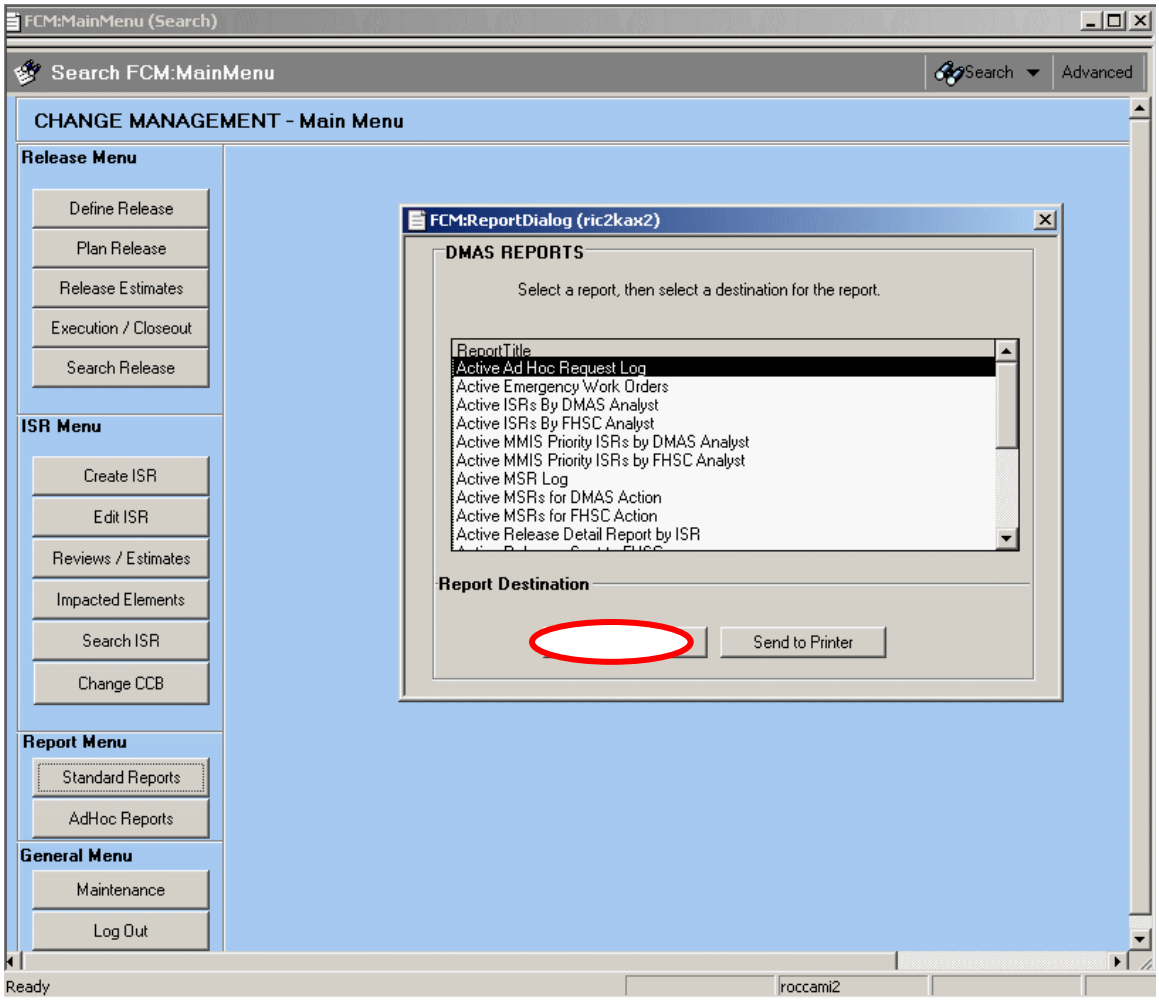
- Select report by clicking on appropriate report title as well as the required report destination (screen or printer). Selected report will be displayed on the screen or routed to the user's default printer depending on the report destination.

- Listed reports are as follows:
  - Active Ad Hoc Request Log
  - Active Emergency Work Orders
  - Active ISRs By DMAS Analyst
  - Active ISRs By FHSC Analyst
  - Active MMIS Priority ISRs by DMAS Analyst
  - Active MMIS Priority ISRs by FHSC Analyst

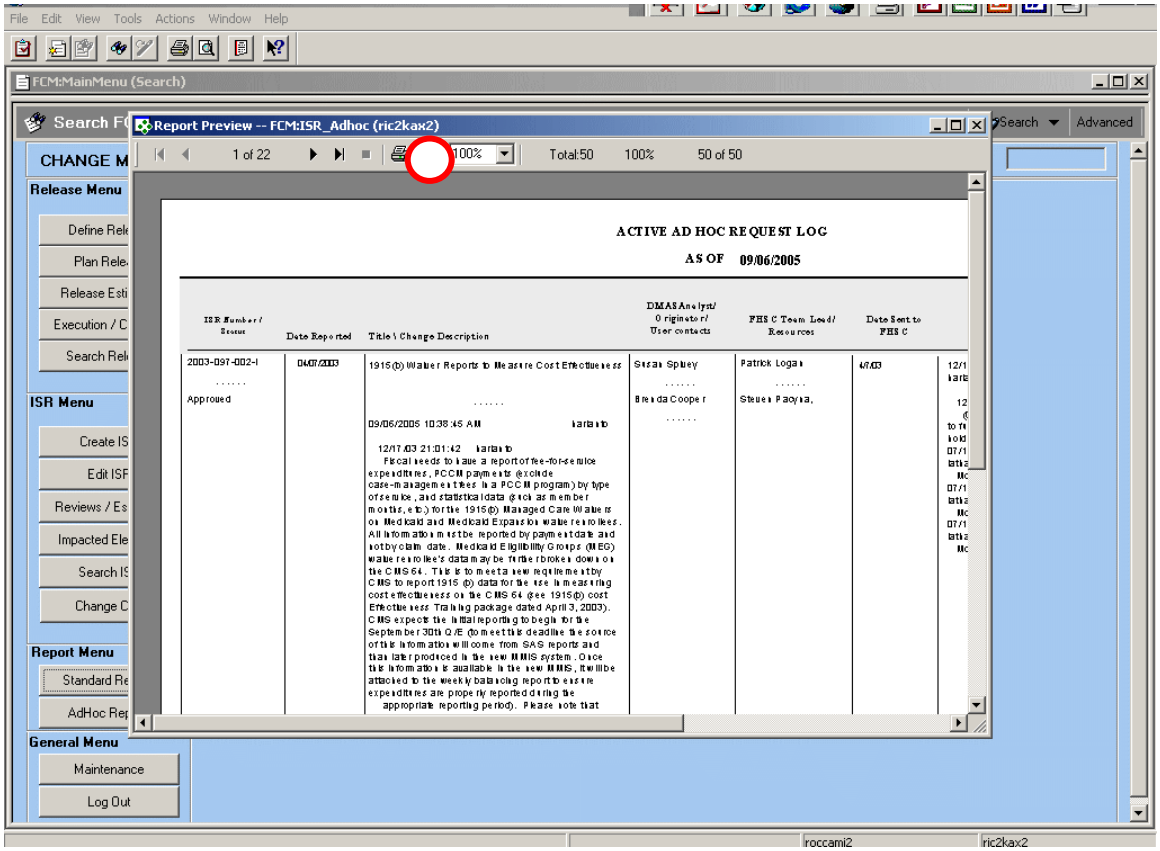
- Active MSR Log
- Active MSRs for DMAS Action
- Active MSRs for FHSC Action
- Active Release Detail Report by ISR
- Active Releases Sent to FHSC
- IRP and Other Problem/Research Log
- IRP and Other Work to be Done
- List D ISRs – Required Post Implementation
- MMIS Active ISRs by FHSC Scheduled Completion Date
- *Overdue ISRs – Awaiting IM Analyst response after Division Director (no report being produced as requirements have not been defined)*
- *Overdue ISRs – Awaiting Impact Assessment from FHSC (no report being produced as requirements have not been defined)*
- Outstanding Overpayment ISRs
- Outstanding Underpayment ISRs
- Resolved Over/Under Payment ISRs
- VAMMIS Completed ISRs and MSRs
- VAMMIS Problem/Research Log

Save Standard Report on Desktop

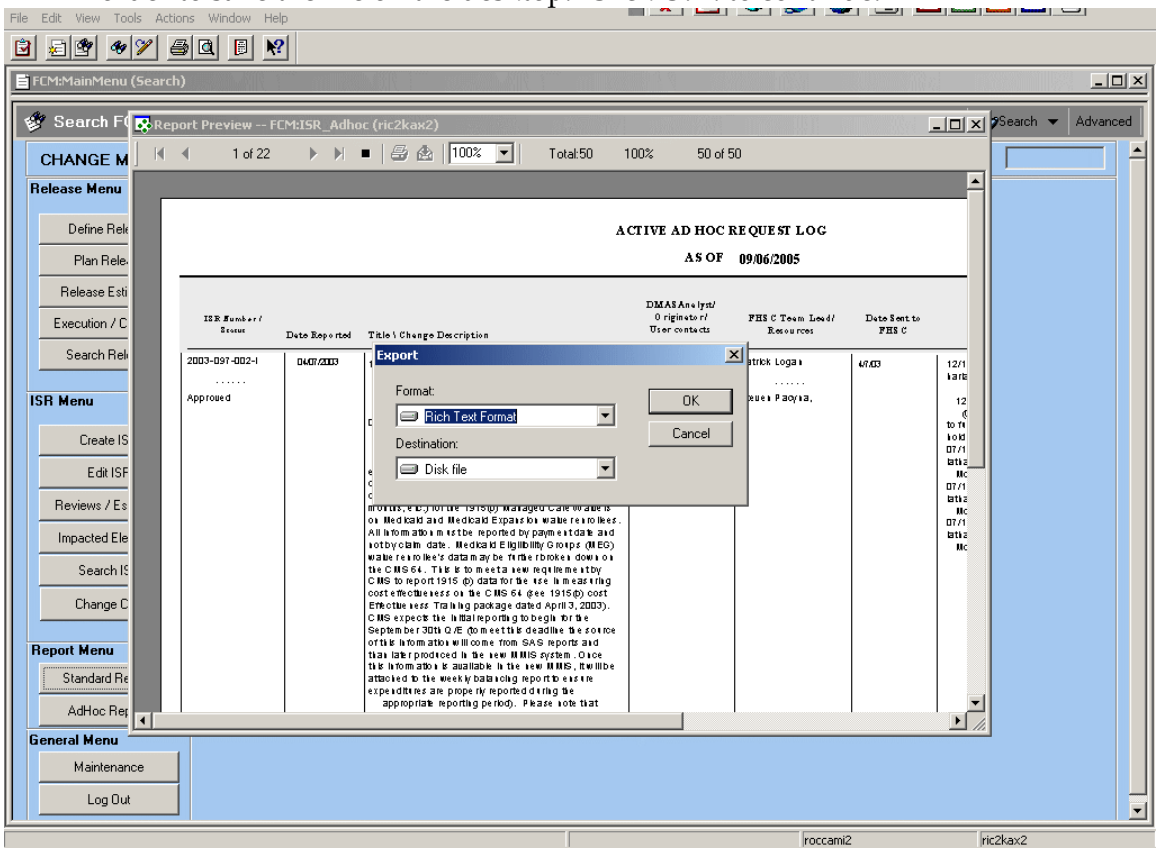
- Any Standard Report can be saved as a file on the Desktop. Let's take the example of saving the 'Active Ad Hoc Request Log' and select 'View on Screen'.



- 'Active Adhoc Request Log' report is displayed as shown below. Click the 'Export' icon to save the report.

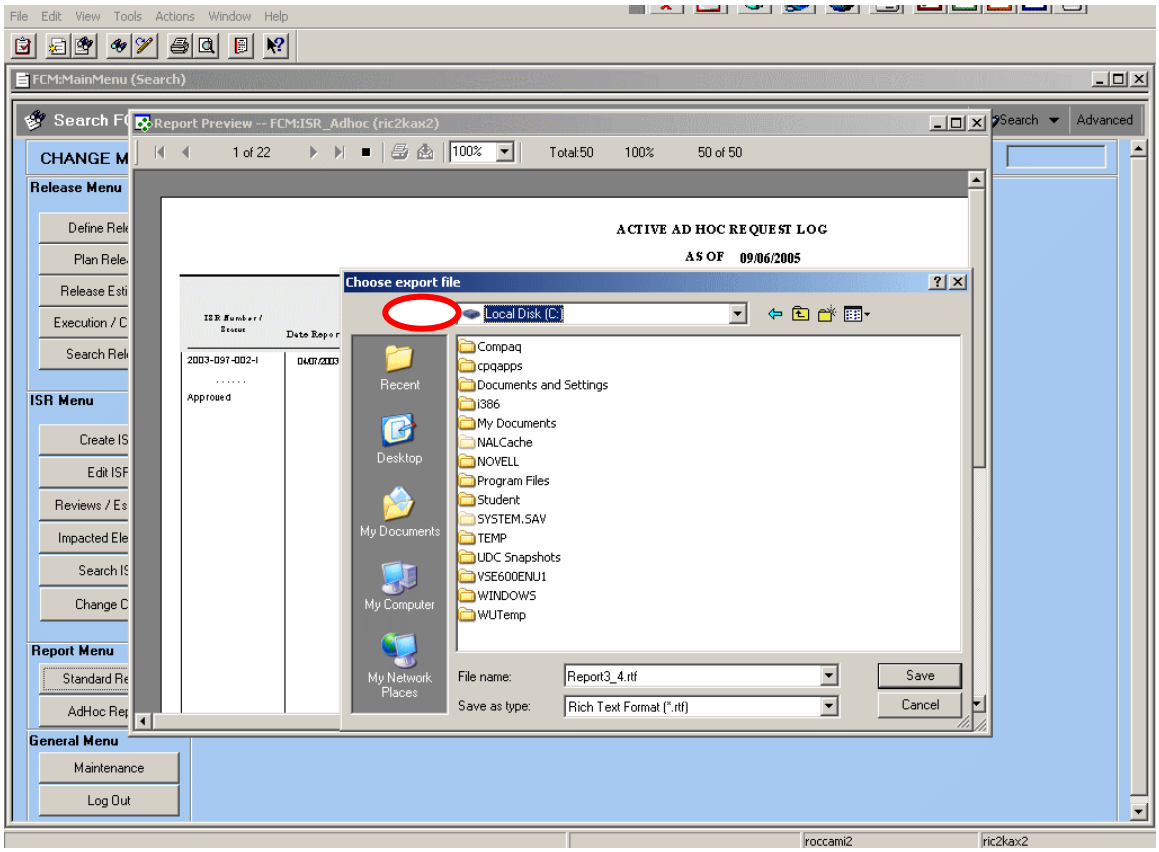


- Popup to select 'Format' and 'Destination' are displayed as shown below. Recommended format is 'Rich Text Format' with Destination' being 'Disk file' in order to save the file on the desktop. Click O.K. to continue.



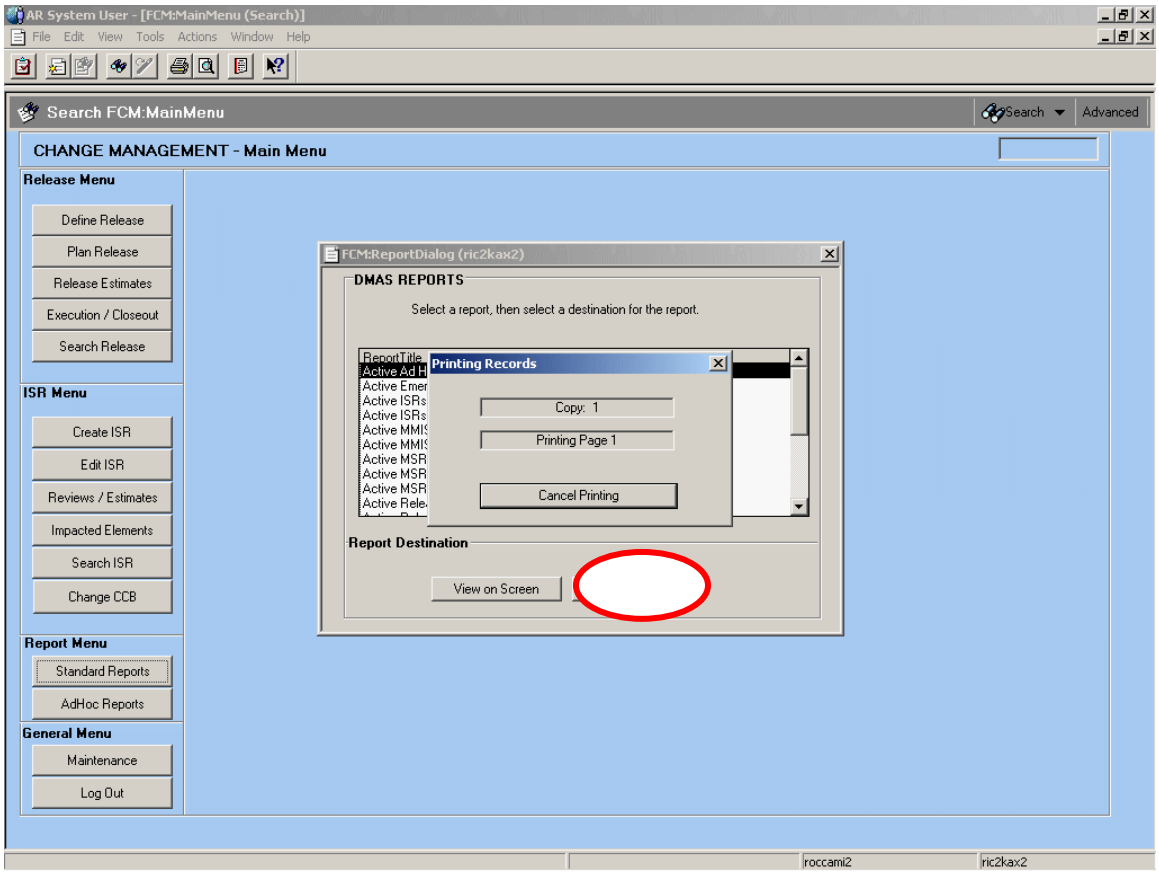
- Screen shown below is displayed. Ensure the 'Save in' is set to C$ (C:) as that is required to have it saved on the user's desktop. Click on the 'Save' to continue and control is returned to the screen view of the report.

  Note: If the C$ on the 'Client (C:) option is not available in the dropdown list, the 'Remedy ARS Client' is required to be installed on the user's desktop. There is no license issue to be concerned about on this front.

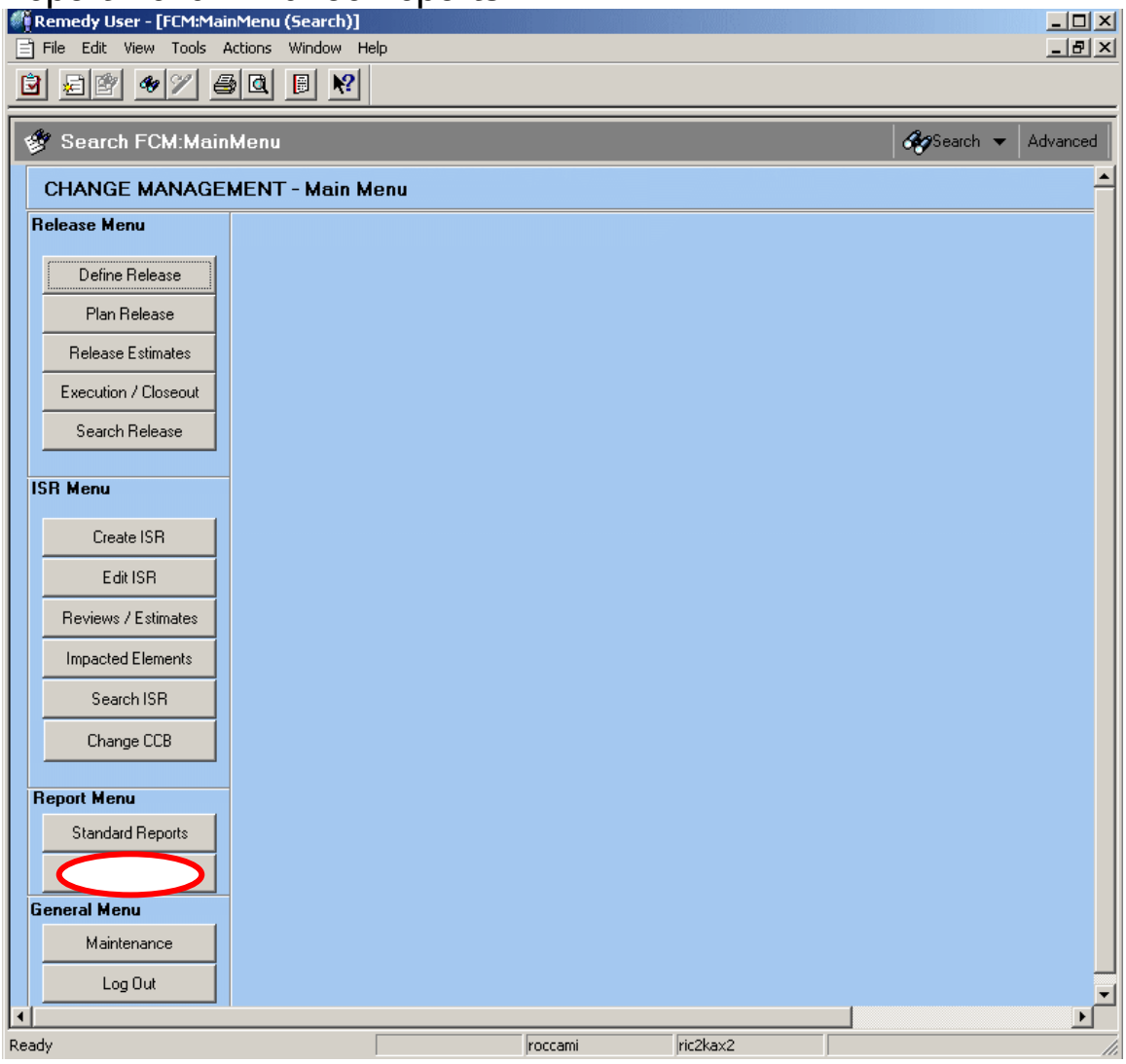


Print Standard Report

- Any Standard Report can be sent directly to the printer. Let's take the example of printing the 'Active Adhoc Request Log' and select Send to Printer. Printing Records popup box should appear as below and the document will be sent directly to the printer.



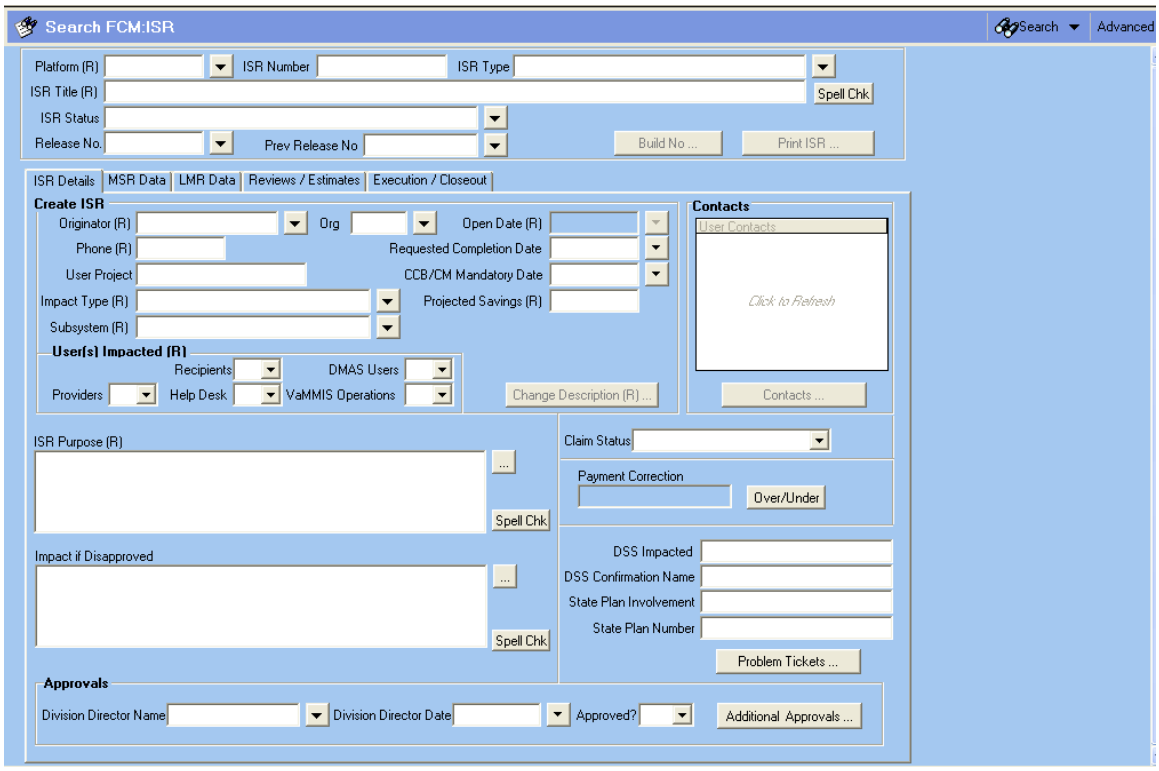
Report Menu – 'Adhoc Reports'



- 'Adhoc Reports' provides the facility to generate Adhoc reports through the search facility. This facility is available to all users.

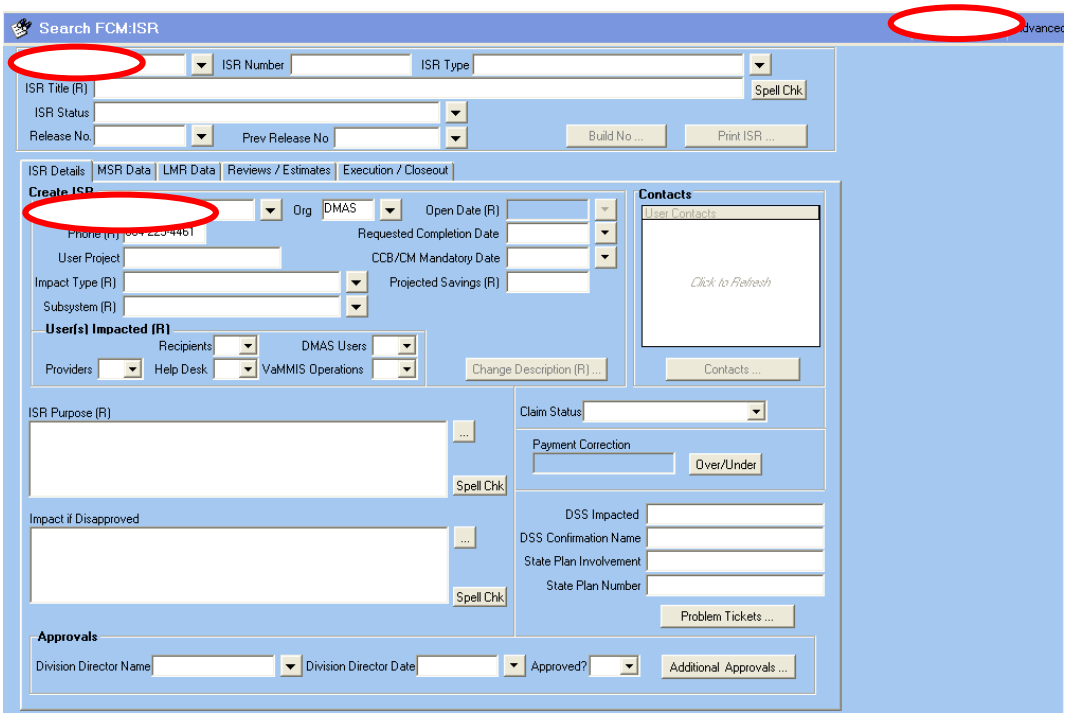
  Note: This can also be done through the 'Search ISR' option under ISR Menu.

- Click on 'Adhoc Reports' and the screen shown below is displayed.

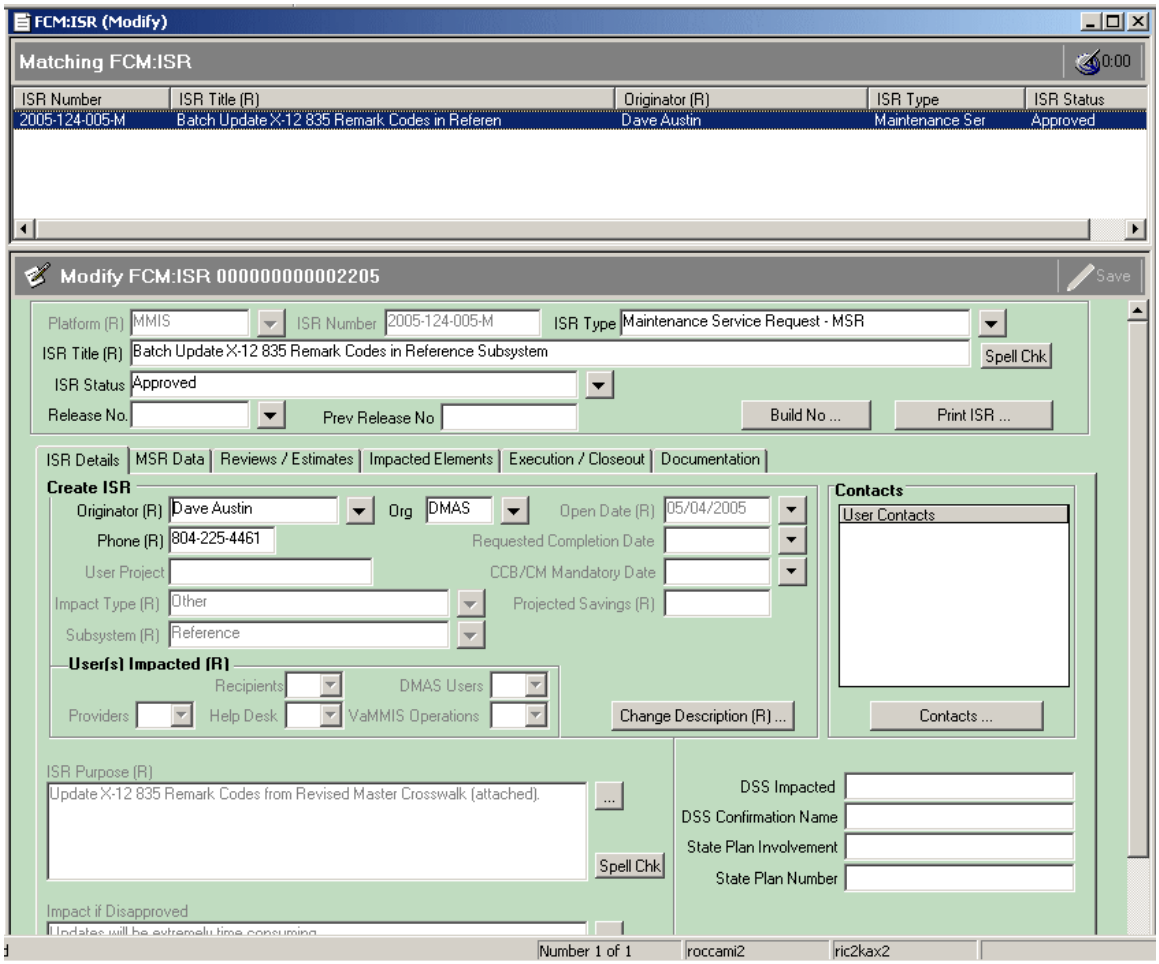

Search FCM:ISR
Search
Advanced
Platform (R)
ISR Number
ISR Type
ISR Title (R)
Spell Chk
ISR Status
Release No.
Prev Release No
Build No ...
Print ISR ...
ISR Details
MSR Data
LMR Data
Reviews / Estimates
Execution / Closeout
Create ISR
Originator (R)
Org
Open Date (R)
Phone (R)
Requested Completion Date
User Project
CCB/CM Mandatory Date
Impact Type (R)
Projected Savings (R)
Subsystem (R)
User(s) Impacted (R)
Recipients
DMAS Users
Providers
Help Desk
VaMMIS Operations
Change Description (R) ...
Contacts
User Contacts
Click to Refresh
Contacts ...
ISR Purpose (R)
Spell Chk
Impact if Disapproved
Spell Chk
Claim Status
Payment Correction
Over/Under
DSS Impacted
DSS Confirmation Name
State Plan Involvement
State Plan Number
Problem Tickets ...
Approvals
Division Director Name
Division Director Date
Approved?
Additional Approvals ...

- When the required search criteria in one or more fields are entered and the 'Search' button is clicked, a query is created and executed.

  Note: Refer to 'ISR Menu – Search ISR' section for more details on this function.

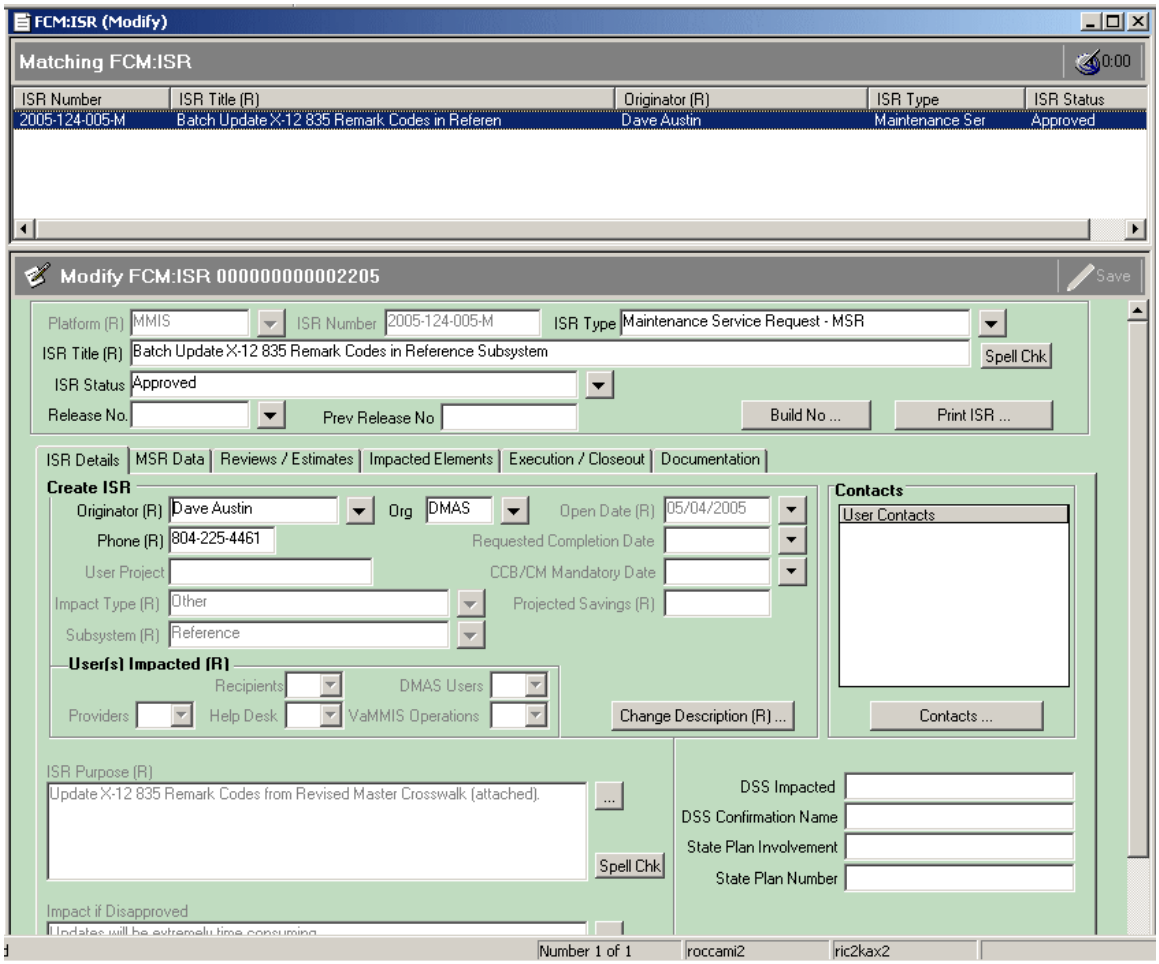


- Results of the search are displayed on a split screen as shown below. Upper frame shows the ISRs fulfilling the entered criteria while the lower frame displays the first ISR on the list. Select any ISR on the list by clicking on it and details of the selected ISR will be displayed.

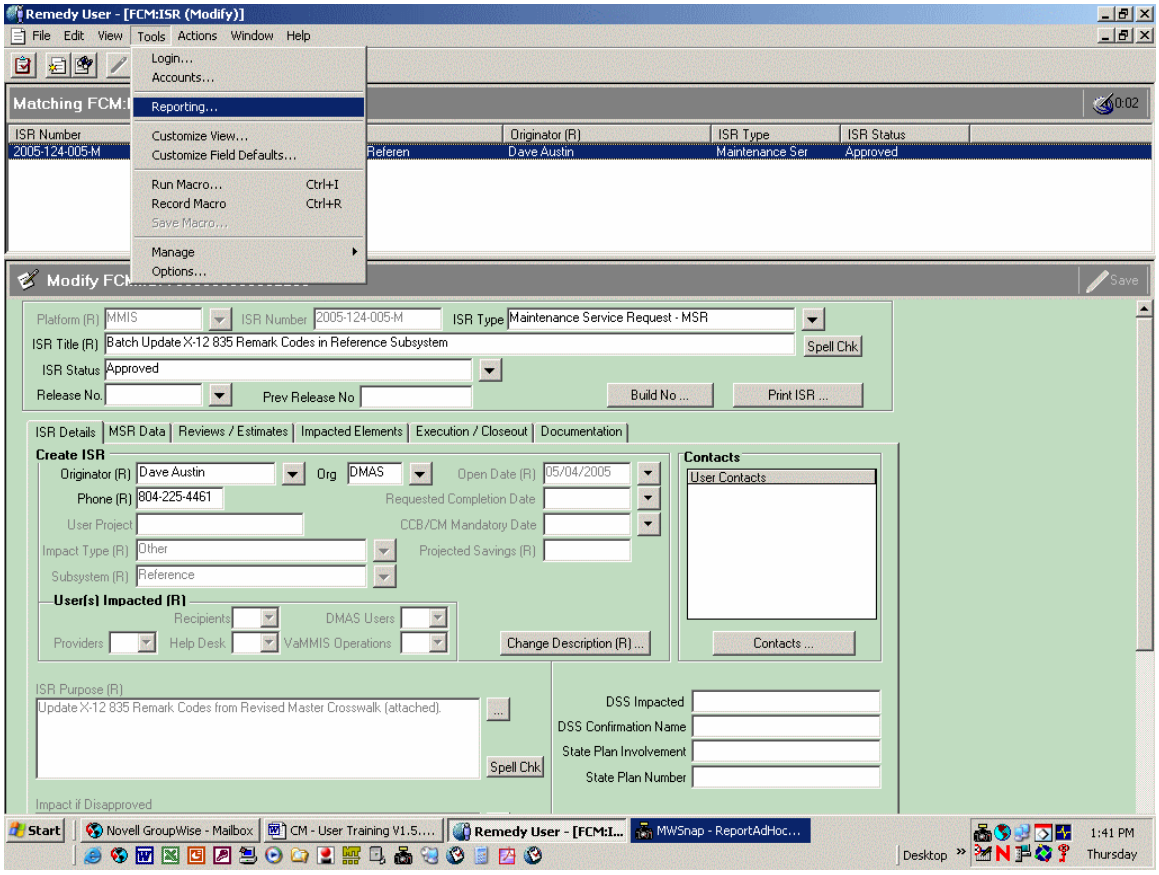


To Create Adhoc Report:

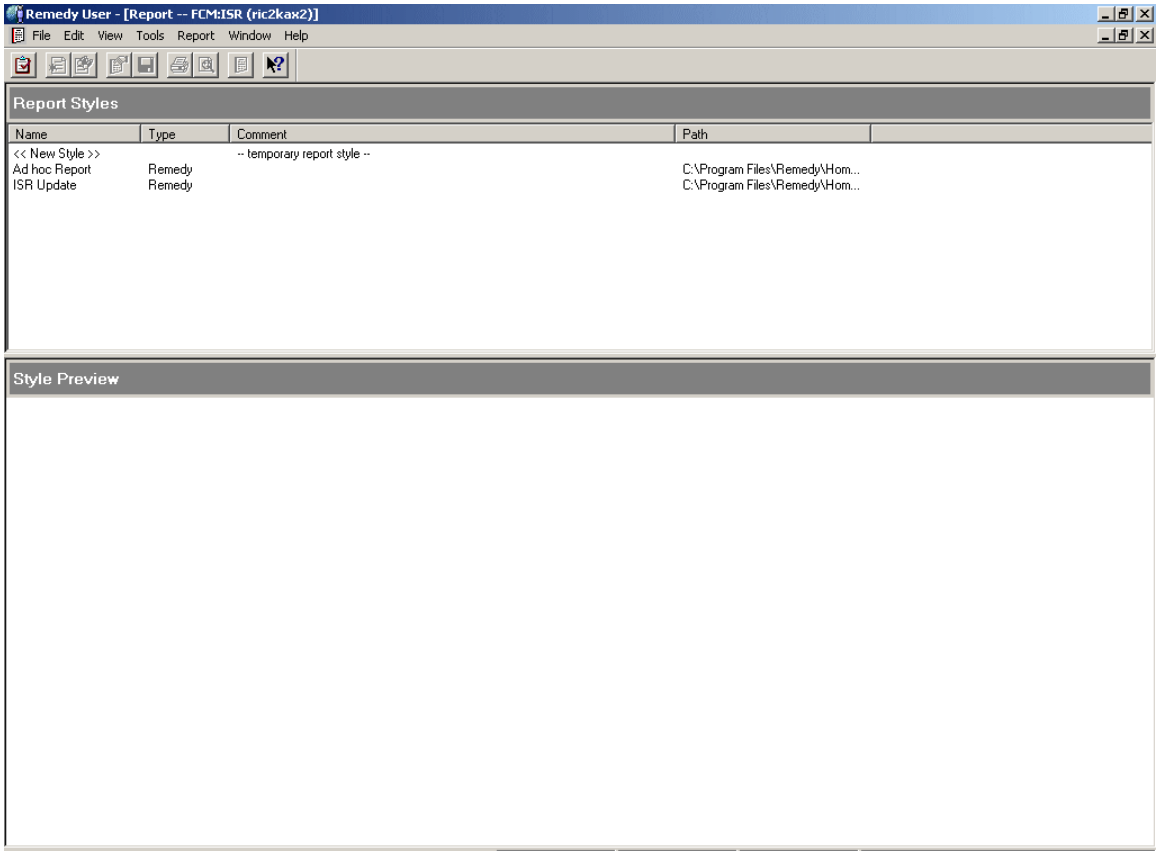
- Select some or all of the ISRs that are required to make up the Adhoc report. In this example all ISRs are selected as shown below.



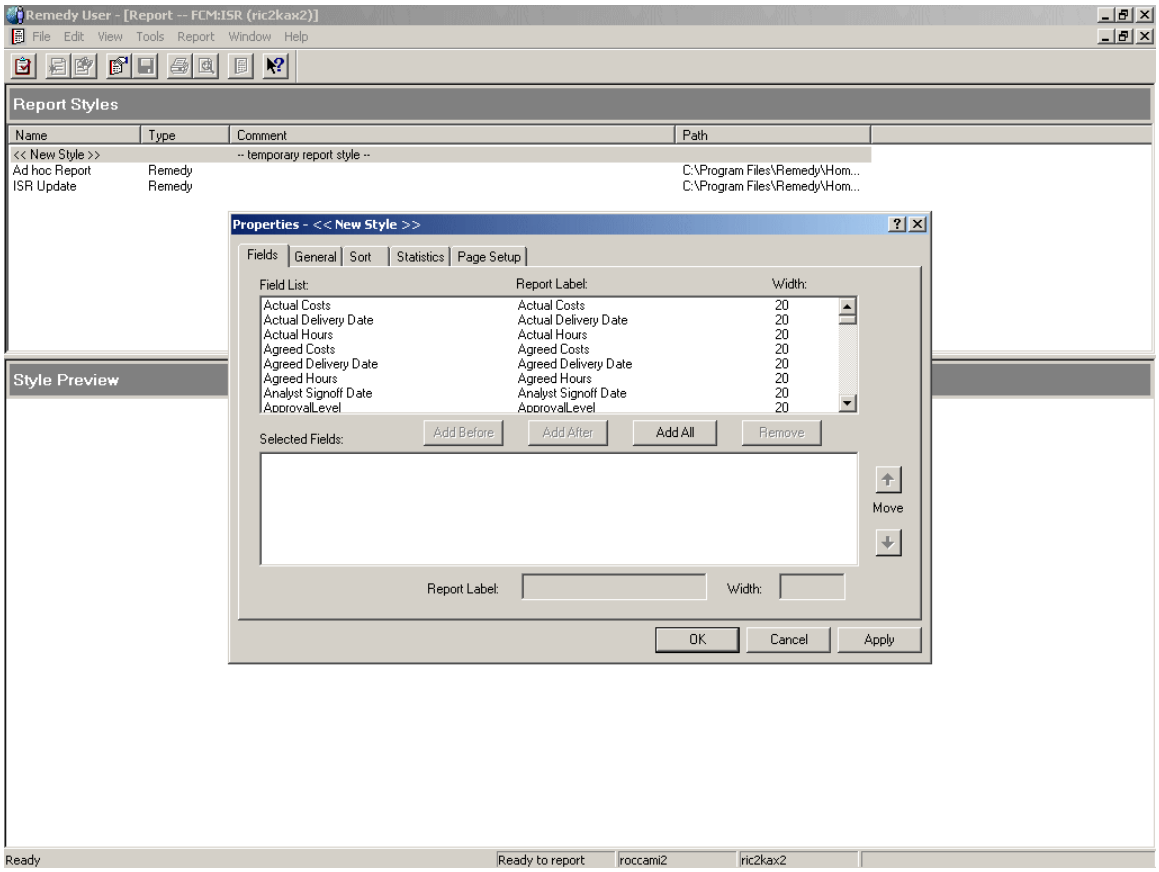
- Select 'Tools/Reporting' from the menu as shown below.



- Screen shown is displayed. Double-click on '<< New Style >>' to create/define a new report.

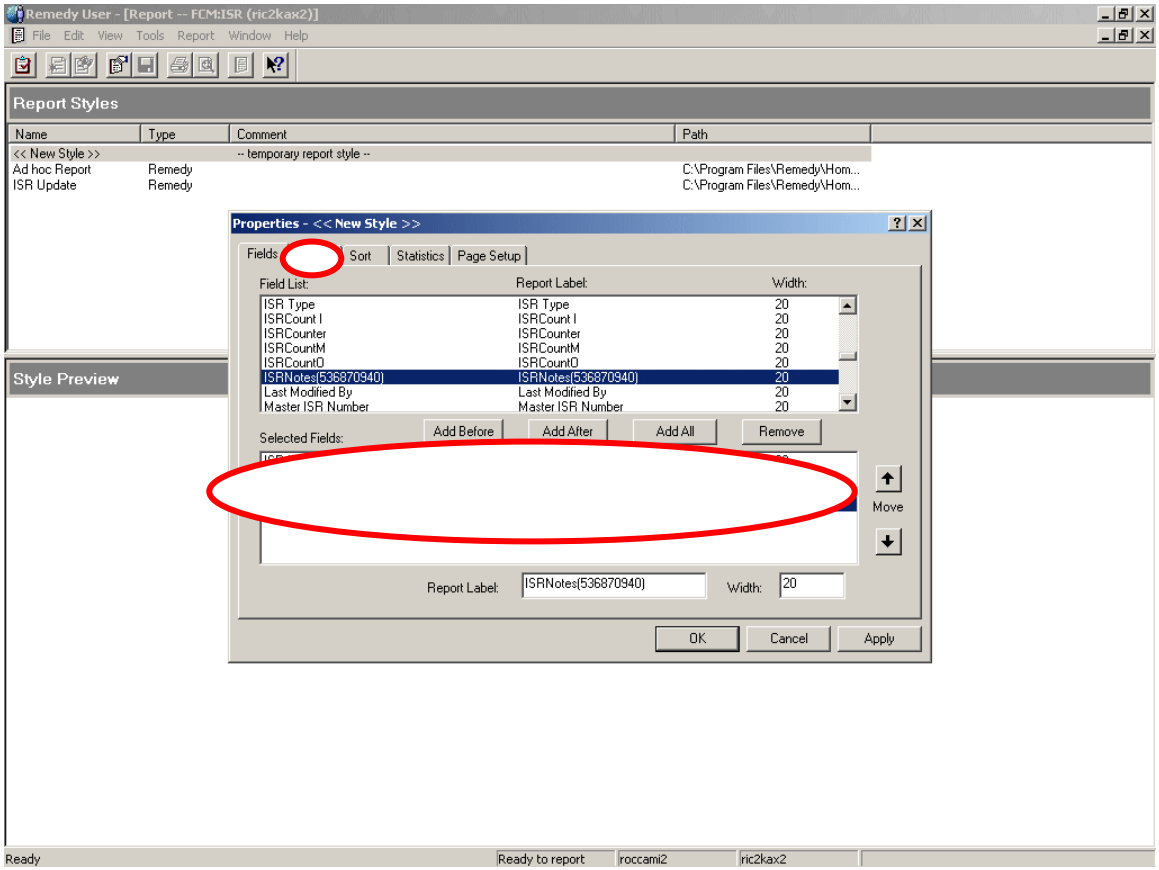


- Screen shown below is displayed.



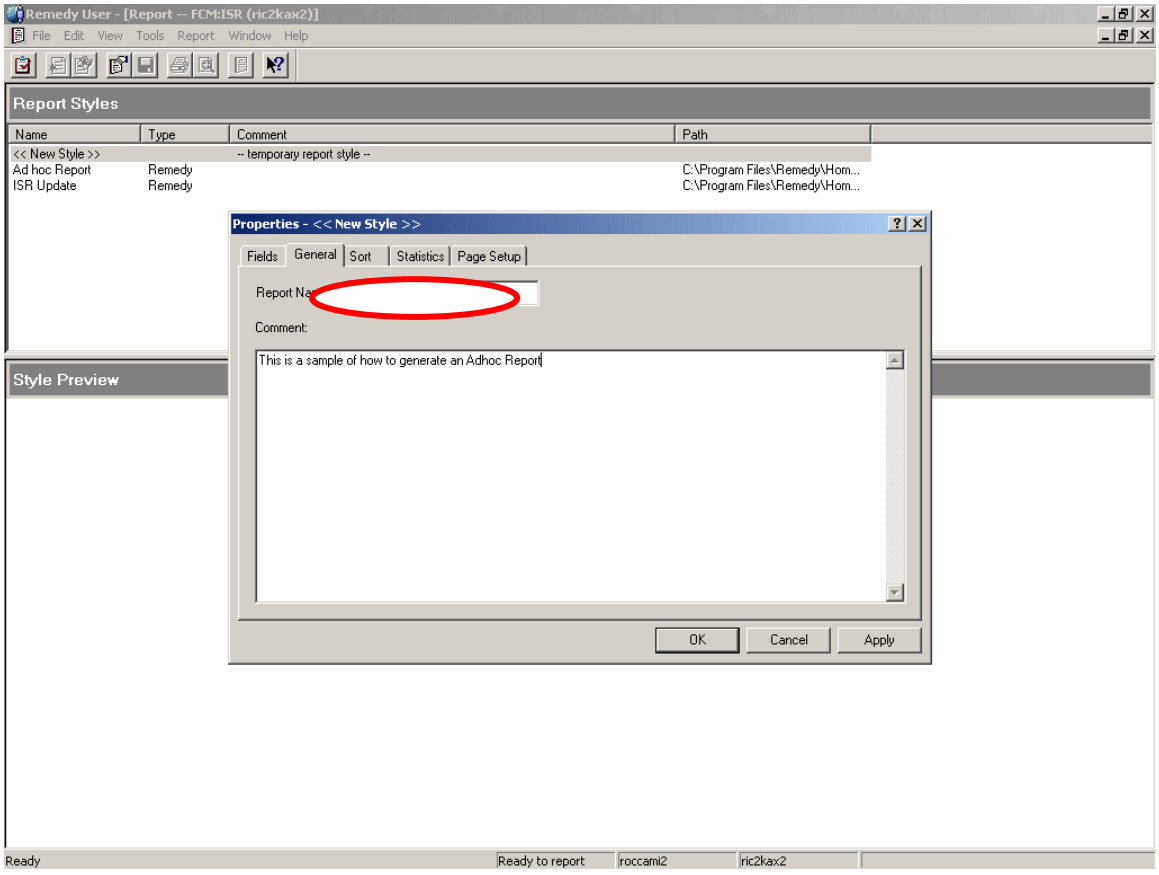
- Select required fields to make up the report from the 'Field List' and add them to the 'Selected Fields'. In this example, 4 fields have been selected – ISR Number, ISR Type, ISR Title, ISR Notes.

- Resulting screen after the fields have been selected is shown below.



- Report can be given a name by clicking on the 'General' tab.

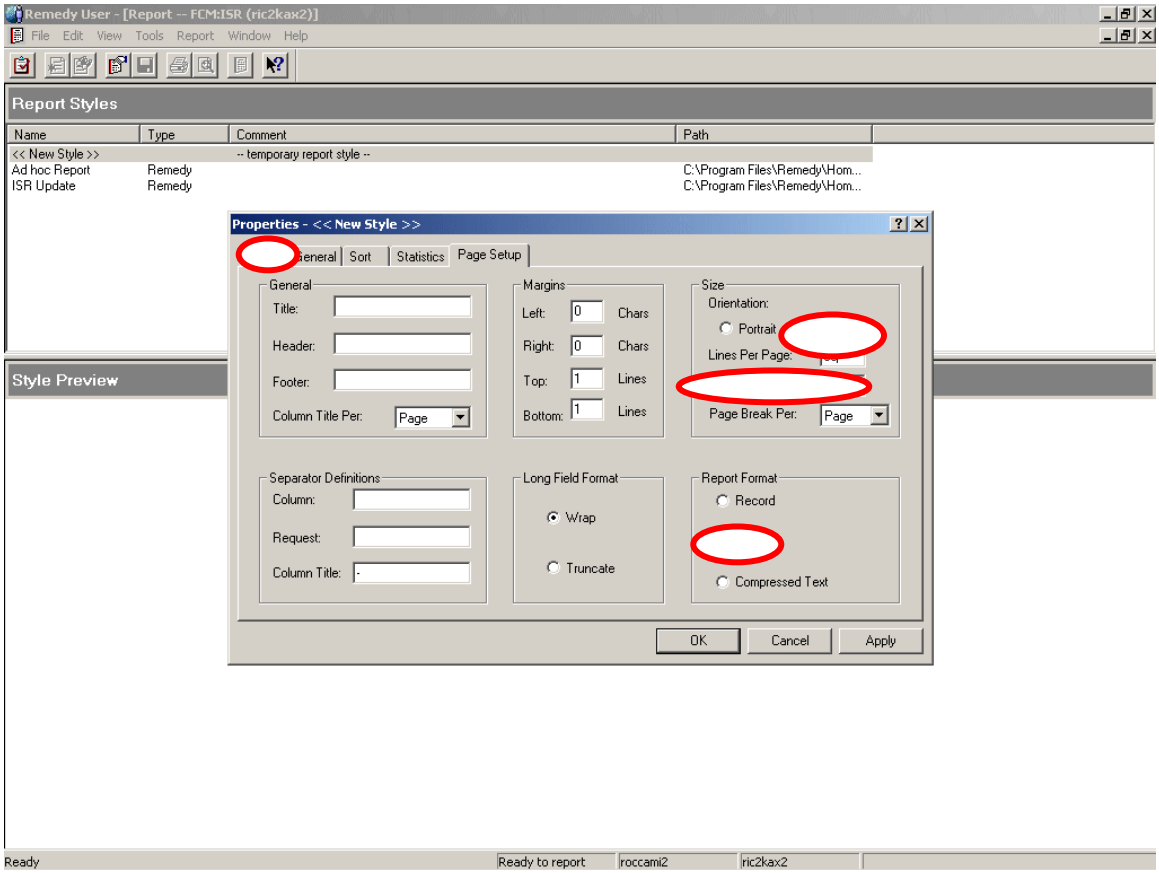
- Screen shown below is displayed when 'General' tab is clicked and 'Report Name' and 'Comment' are entered.



- Report requirements can be modified using the remaining tabs (Sort, Statistics, and Page Setup). In this example, the 'Page Setup' tab is selected to modify certain criteria.

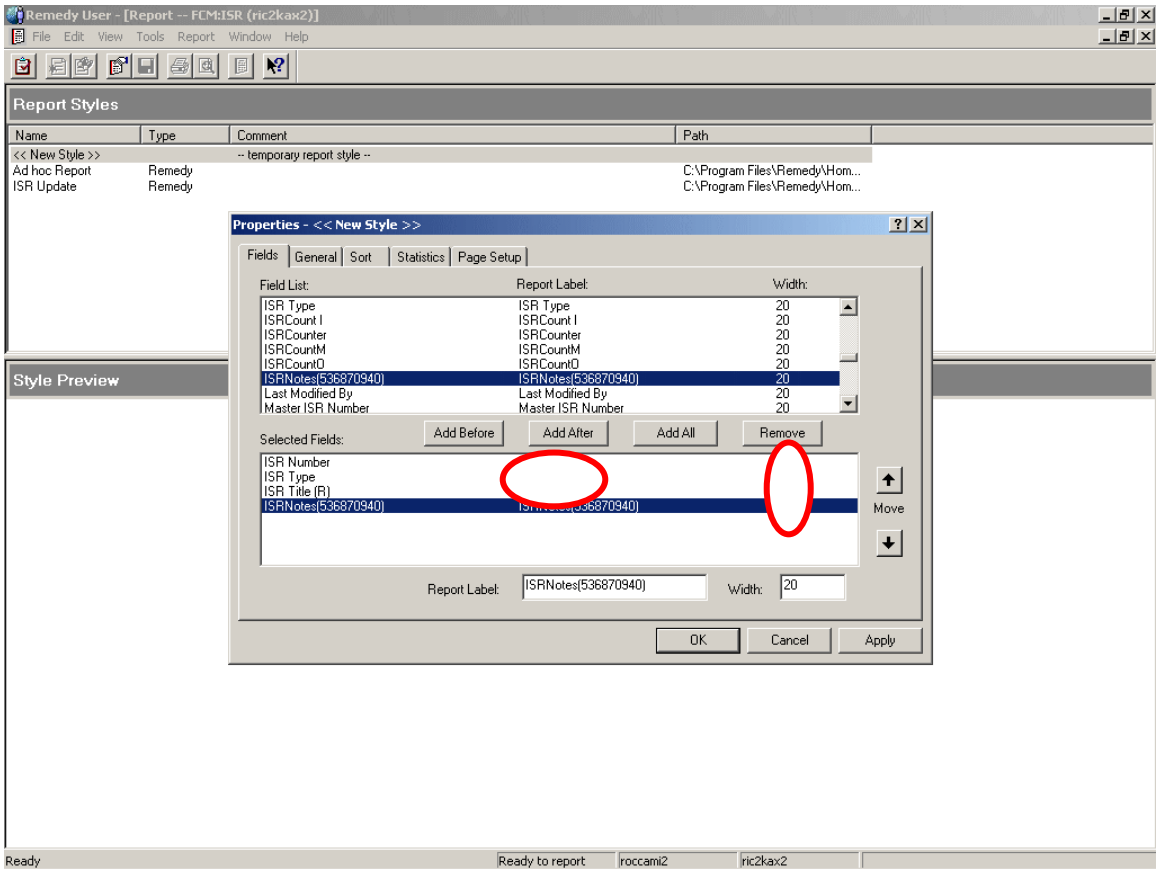
- Screen shown below is displayed with changes made for the following:

  - 'Size Orientation' is set to 'Landscape'
  - 'Chars Per Line' is set to 120
  - 'Record Format' is set to 'Column'.



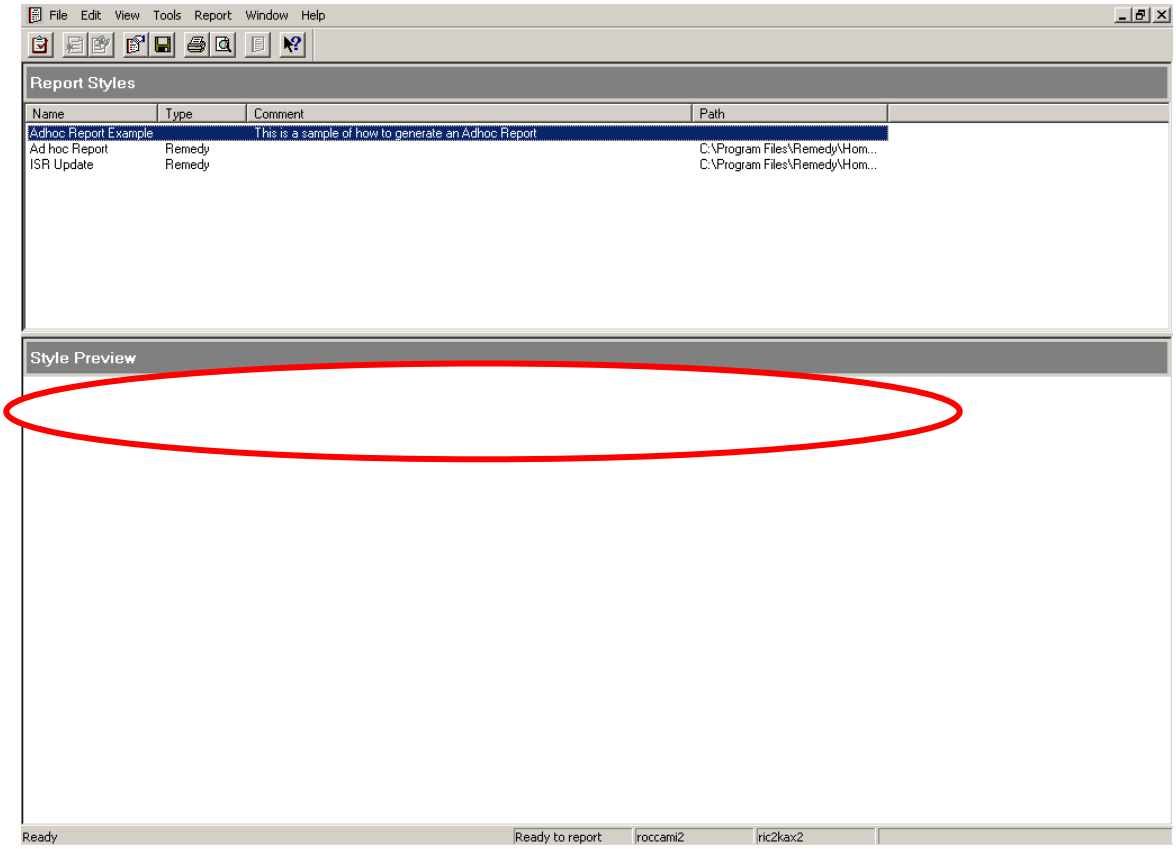
- 'Fields' tab is selected to return to the selected columns to make some final changes for the report.

- Screen shown below is displayed. Report labels and width for the selected fields can be modified if needed. In this example, the 'ISR Title (R)' and 'ISRNotes(536870940)' are modified to be 'ISR Title' and 'ISR Notes' respectively. Width for each field is also modified to spread the information across the page. Resulting screen is shown below.

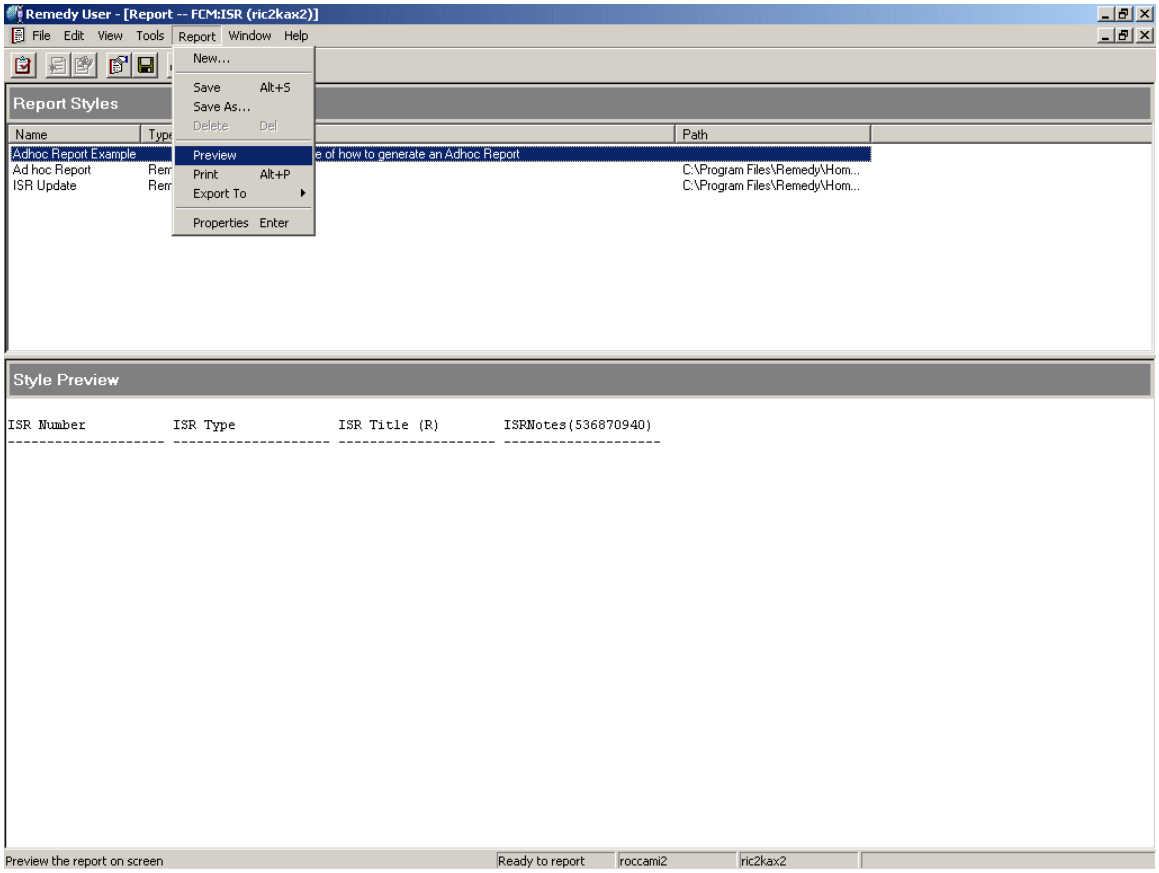


- Click on 'OK' to exit the dialog box.

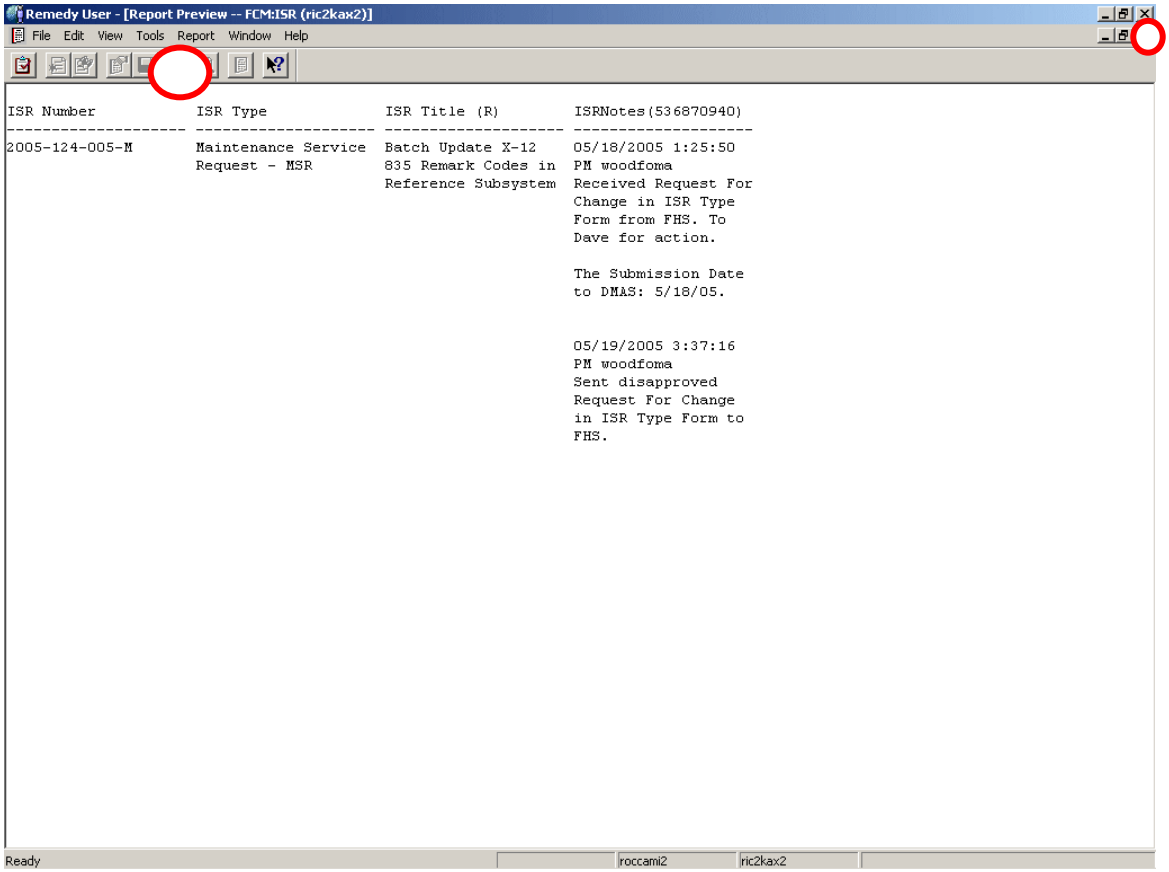
- Screen shown below is displayed. Lower part of the screen (Style Preview) shows the format of the report that has been created.



- Select 'Report/Preview' from the menu as shown below to view the report with data from the selected ISRs.

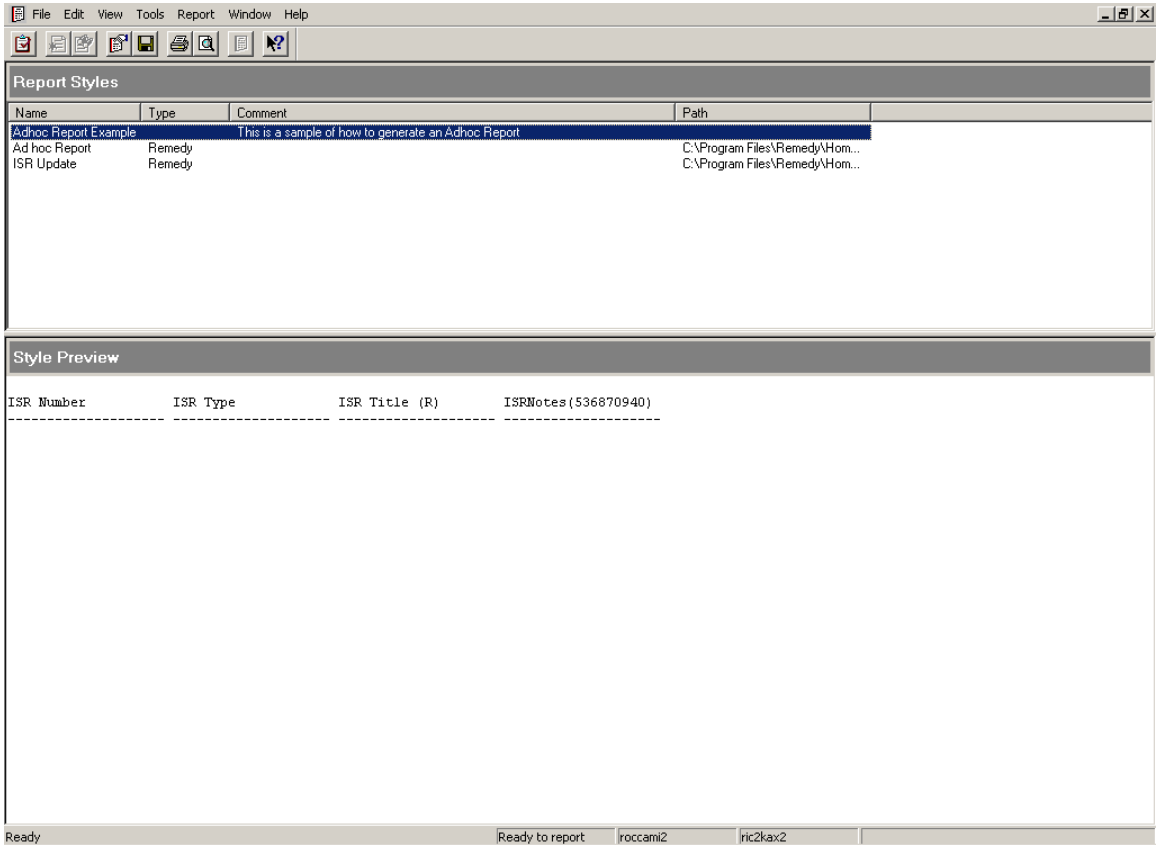


- Warning message 'ARWARN [8911] Some of the fields have been truncated from the results list because the total length of the fields and separators is greater than the maximum allowed' may appear. Click 'OK' to continue.
- Report generated is shown as displayed below. It can be printed using the printer icon and the report will be routed to the user's default printer.

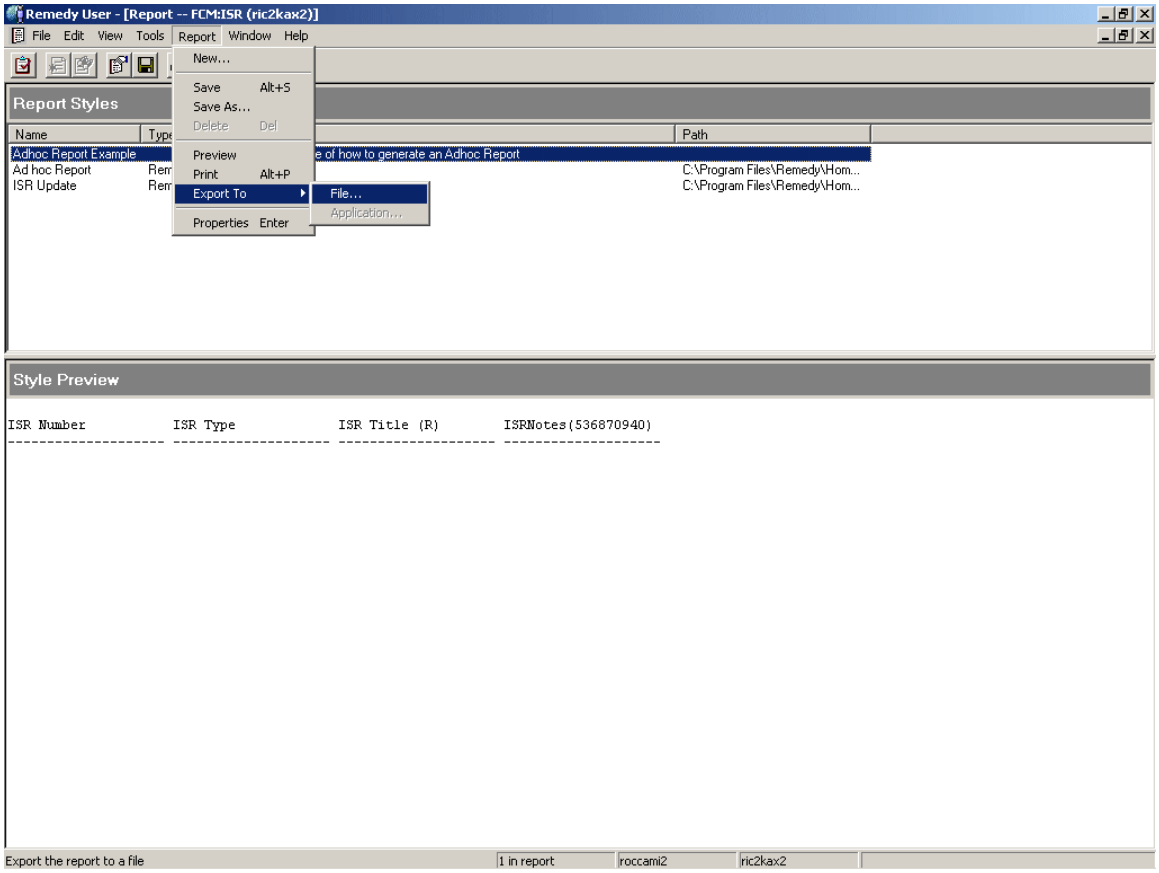


- Exit from the 'Report Preview' screen by clicking on the lower 'X' in the top right corner.

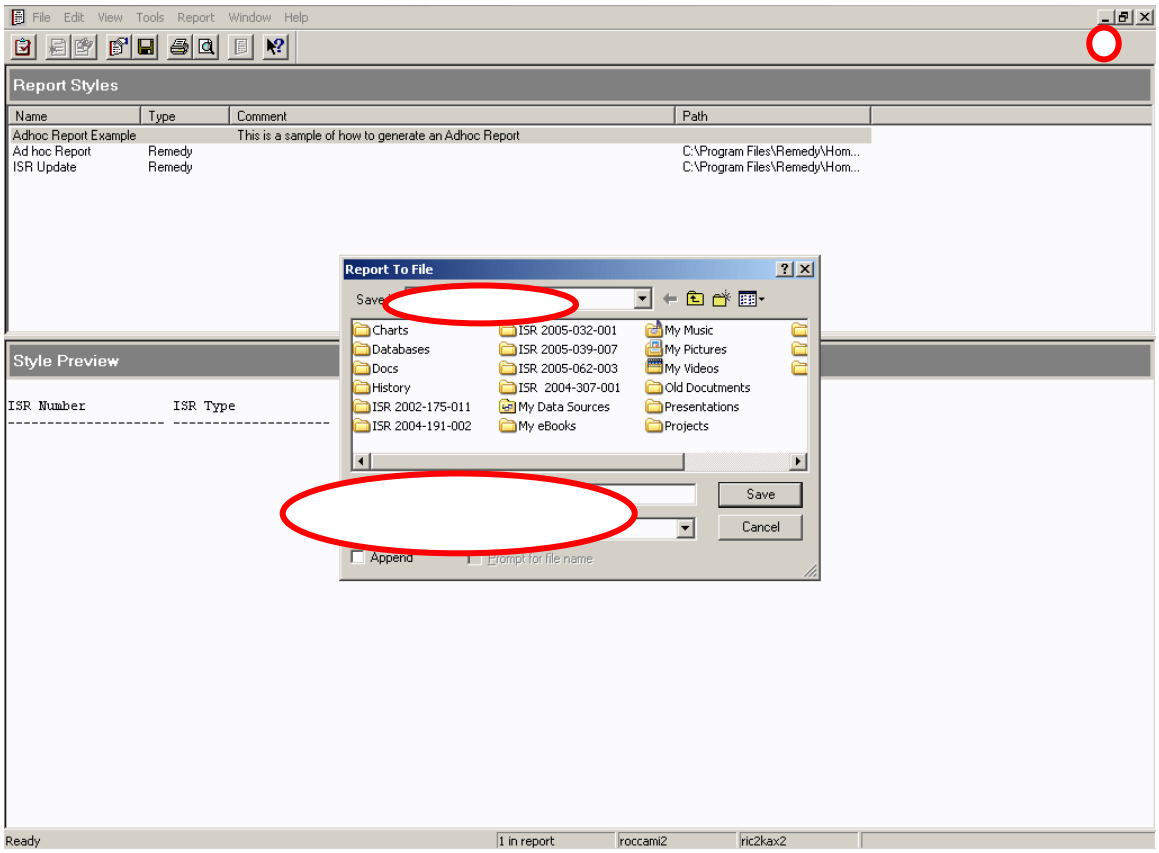
- Screen shown below is displayed.



- Report can be saved to a file if required. Select 'Report/Export To/File' from the menu as shown below.

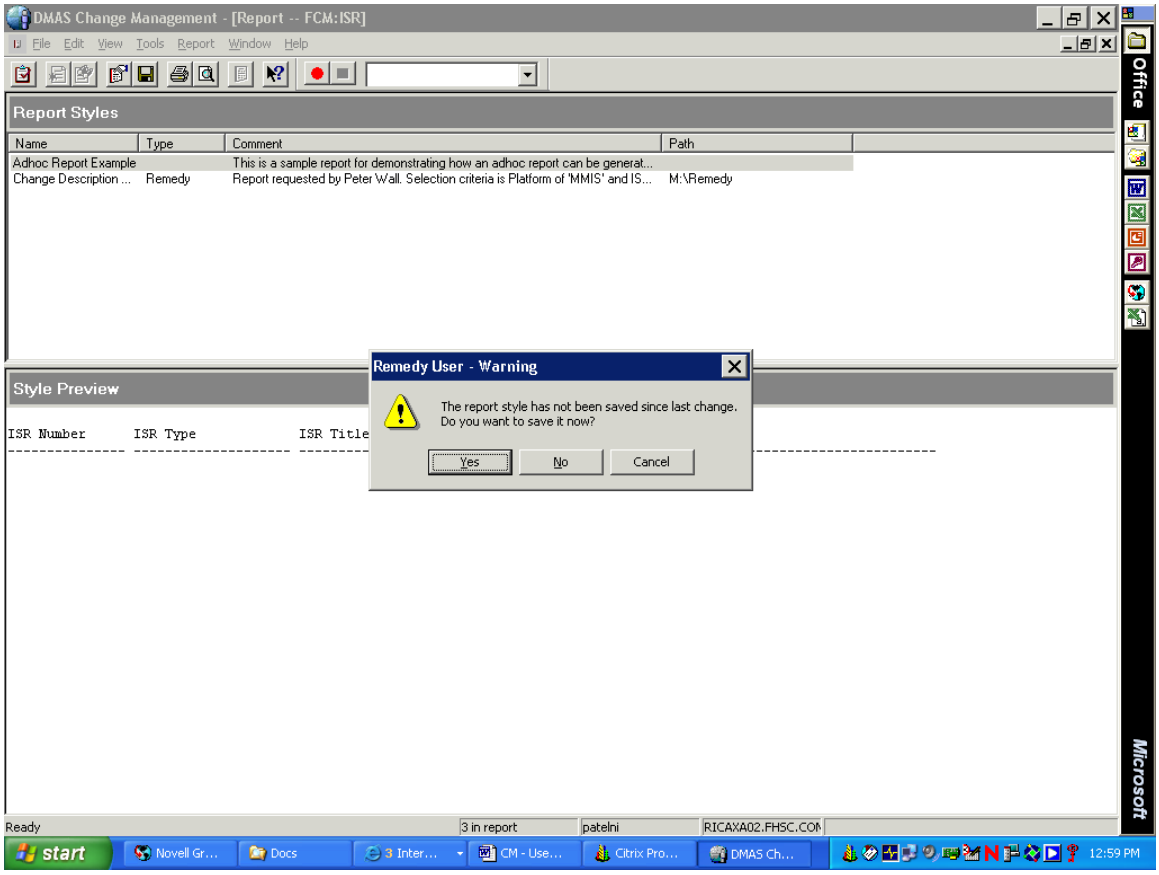


- Screen shown below is displayed.

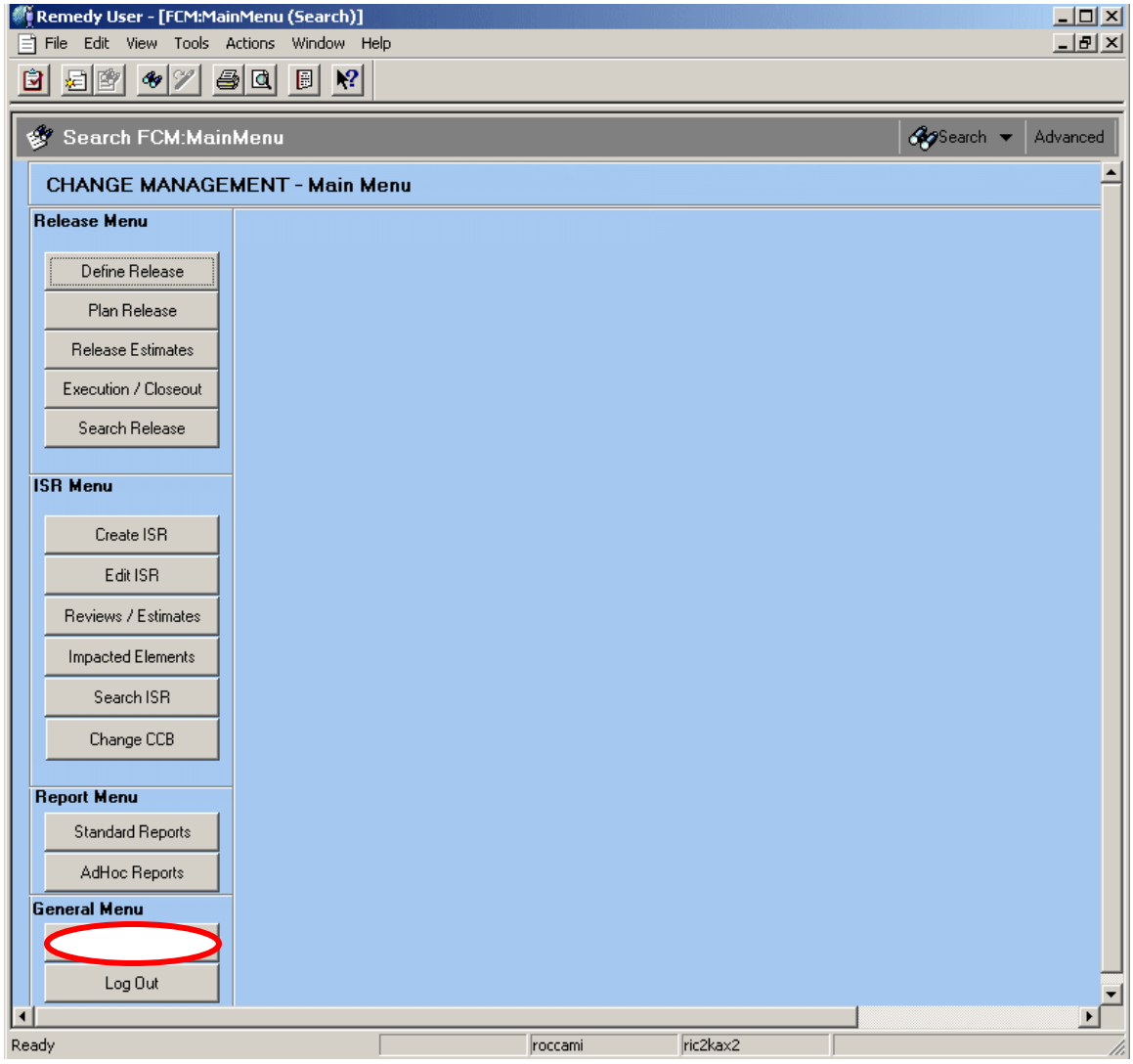


- Ensure the 'Save in' is set to **C$ on 'Client' (C:)** while the 'File name' can be set to the required name (eg. Adhoc Report Sample). 'Save as type' can be selected as required. Click on 'Save' to save file.
- Warning message 'ARWARN [8911] Some of the fields have been truncated from the results list because the total length of the fields and separators is greater than the maximum allowed' may appear. Click 'OK' to continue.

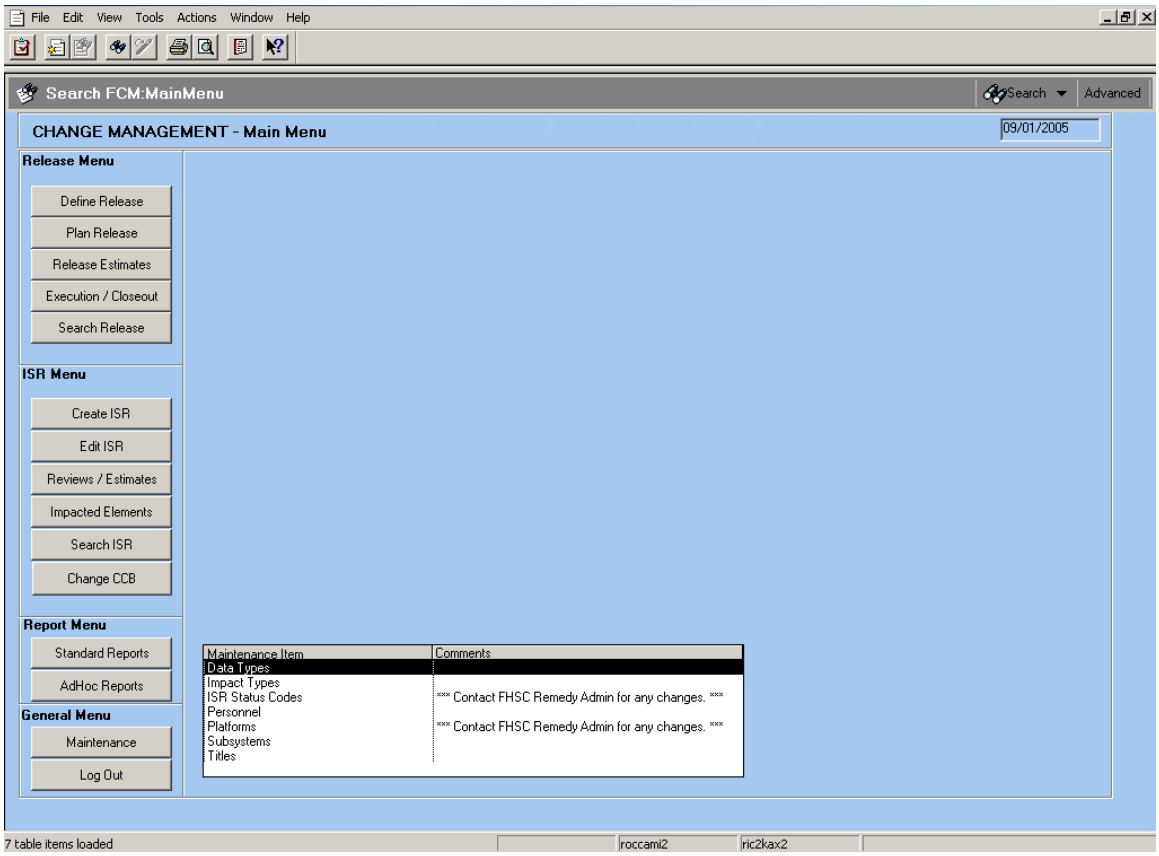
- On returning to the 'Report Styles / Style Preview' screen, click on the lower 'X' in the top right corner.
- Warning message may appear as a reminder if the modified report format has not been saved. Click on 'Yes'.



General Menu – 'Maintenance'



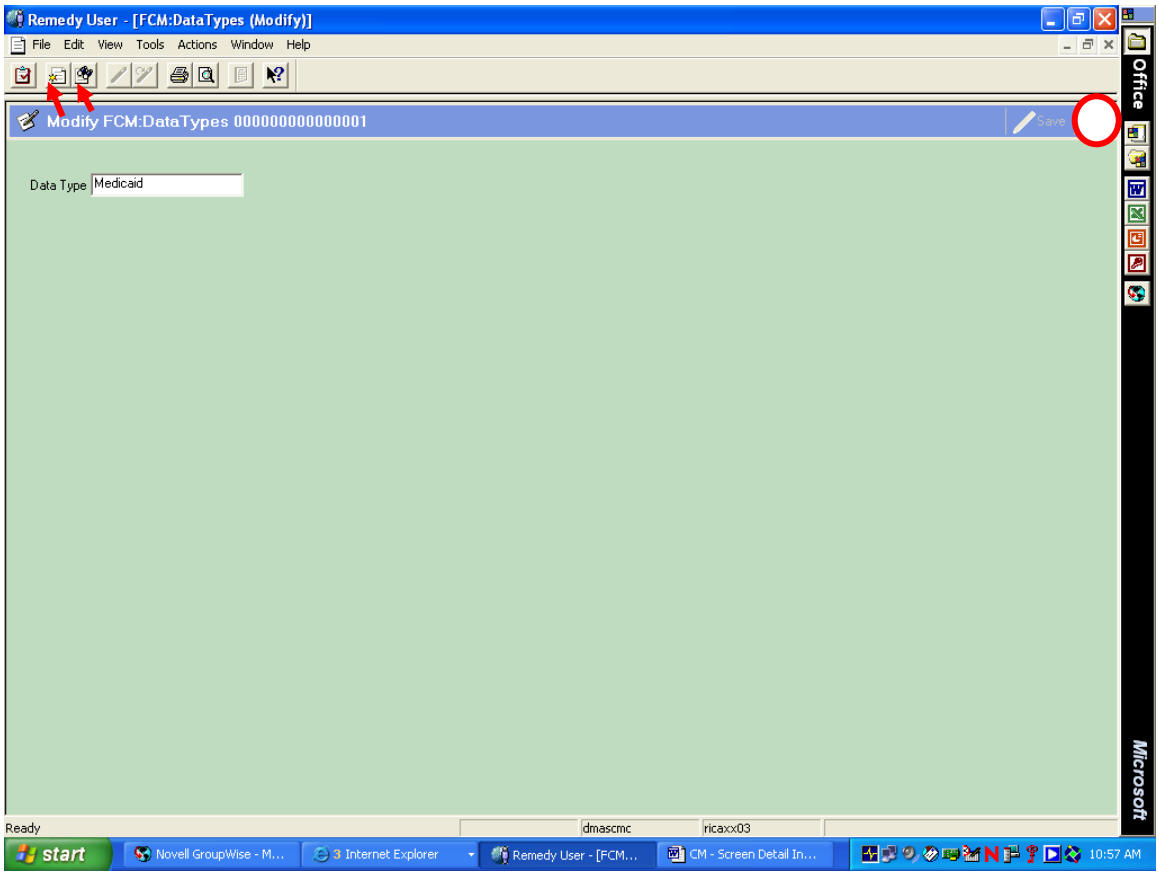
- 'Maintenance' provides the facility to perform the setup and security aspects of the application. This facility is available to DMAS CM Coordinator only.
- This facility is used for system setup and should be used with extreme caution.
- Click on 'Maintenance' and the screen shown below is displayed.



- List of available Maintenance Items are shown. Outlined below are the details of each Maintenance Item.

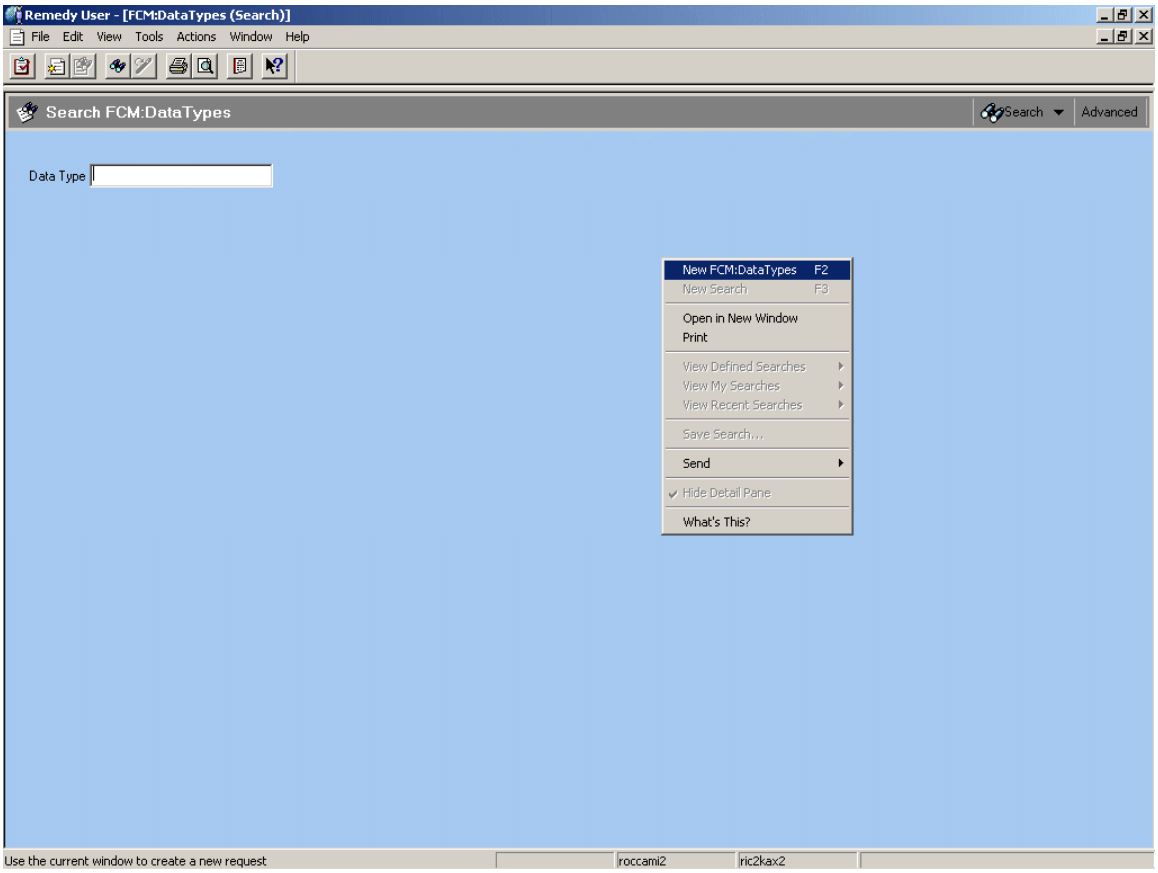
#	Maintenance Item	Instructions/Comments
1	Data Types	Applies to ISR Type of 'ADH': Tab Name: ISR Details Group Name: Type of Information Field Name: Data Type Allows adding/modifying/deleting the options shown in the dropdown list for 'Data Type' field. Data Types is a character field and can contain up to 20 characters. Note: Consult Remedy developer/administrator before using this facility. There is currently no system impact if a 'Data Type' is added. However, there is system impact if a 'Data Type' is modified or deleted.

Double click on 'Data Types' and the screen shown below is displayed.

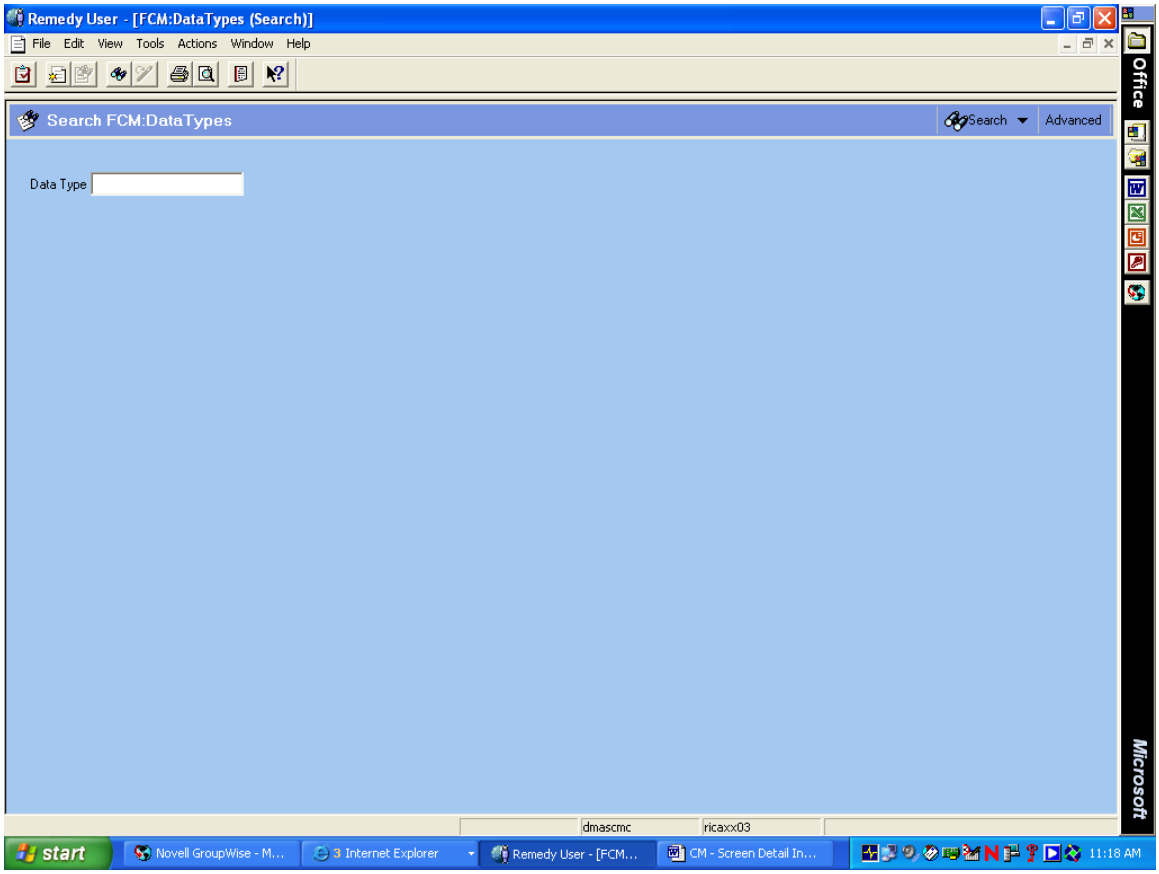


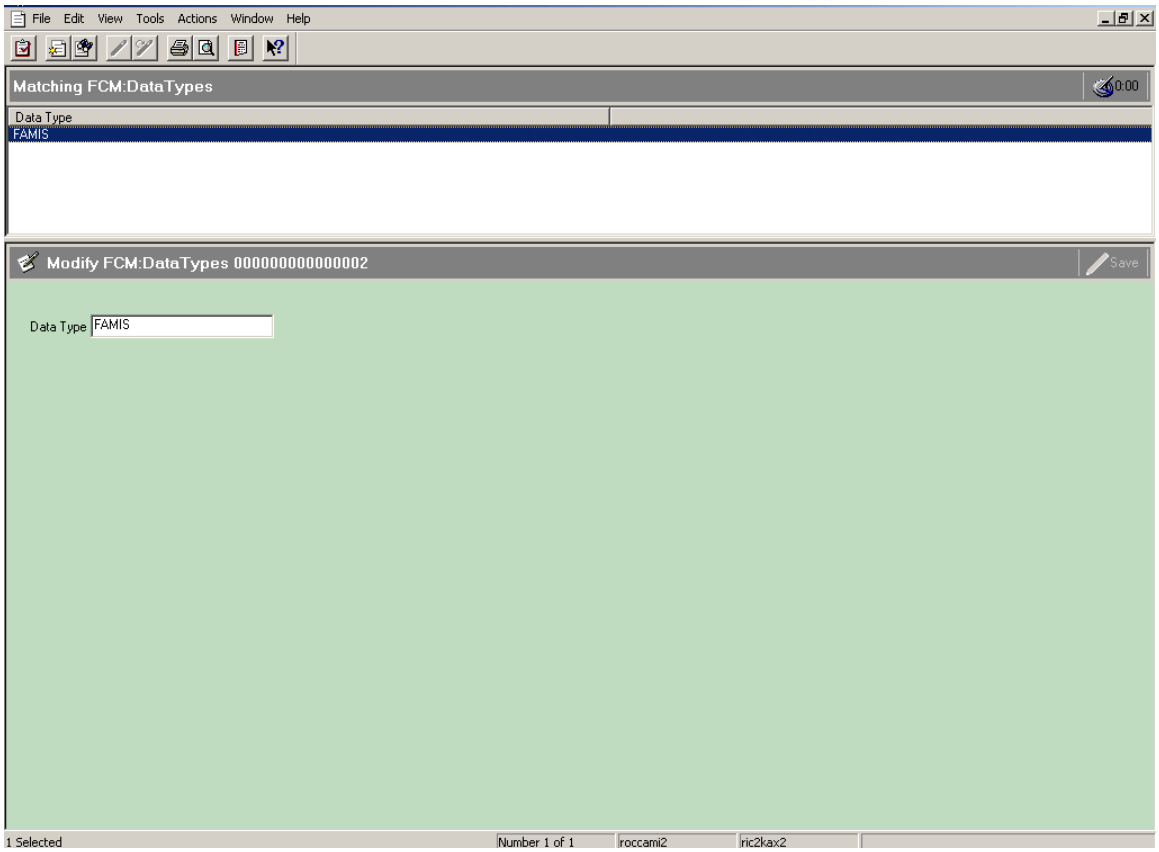
- 'Add' Entry – Click on 'New Request' icon (second icon near top left corner), enter the new 'Data Type' info, and 'Save' the entry.
- 'Modify' entry - Locate the required entry, make the changes, and 'Save' the entry.
- 'Delete' entry – Click on 'New Search' icon (third icon near top left corner). Screen shown below appears.

- To run a search right click on the desktop and the screen shown below appears
- Select New Search or click F3.



- Enter the required 'Data Type' (eg. FAMIS), and click on 'Search' button. Screen shown below appears.
- To return to the previous screen right click on the desktop and select New FCM:xxx (will change depending on if user selected Data Type, Impact Types, ISR Status Codes, Personnel, Platforms, Subsystems or Titles. F2.

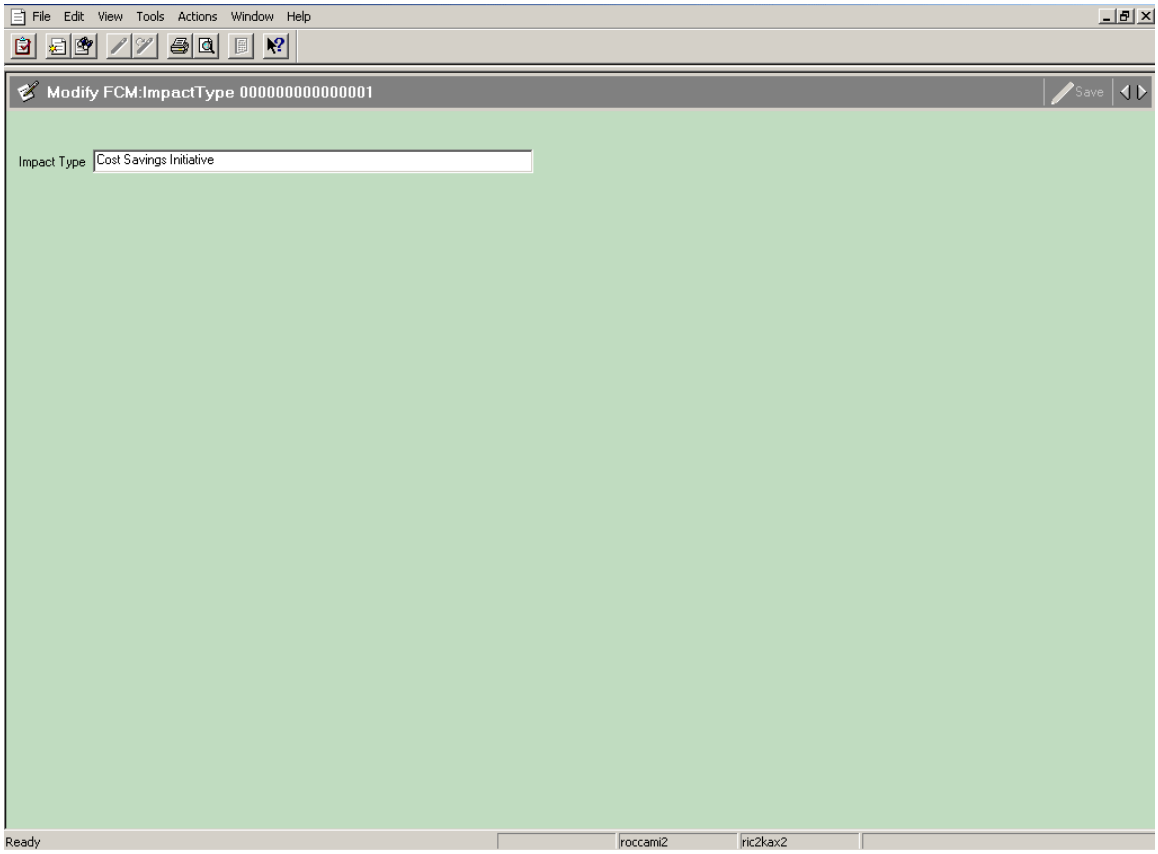




Entry to be deleted is highlighted in the top frame and its details shown in the bottom frame (in this case, the 'Data Type' is the only detail). Select 'Actions' from menu at top of screen and 'Delete' from the dropdown list to delete the entry.

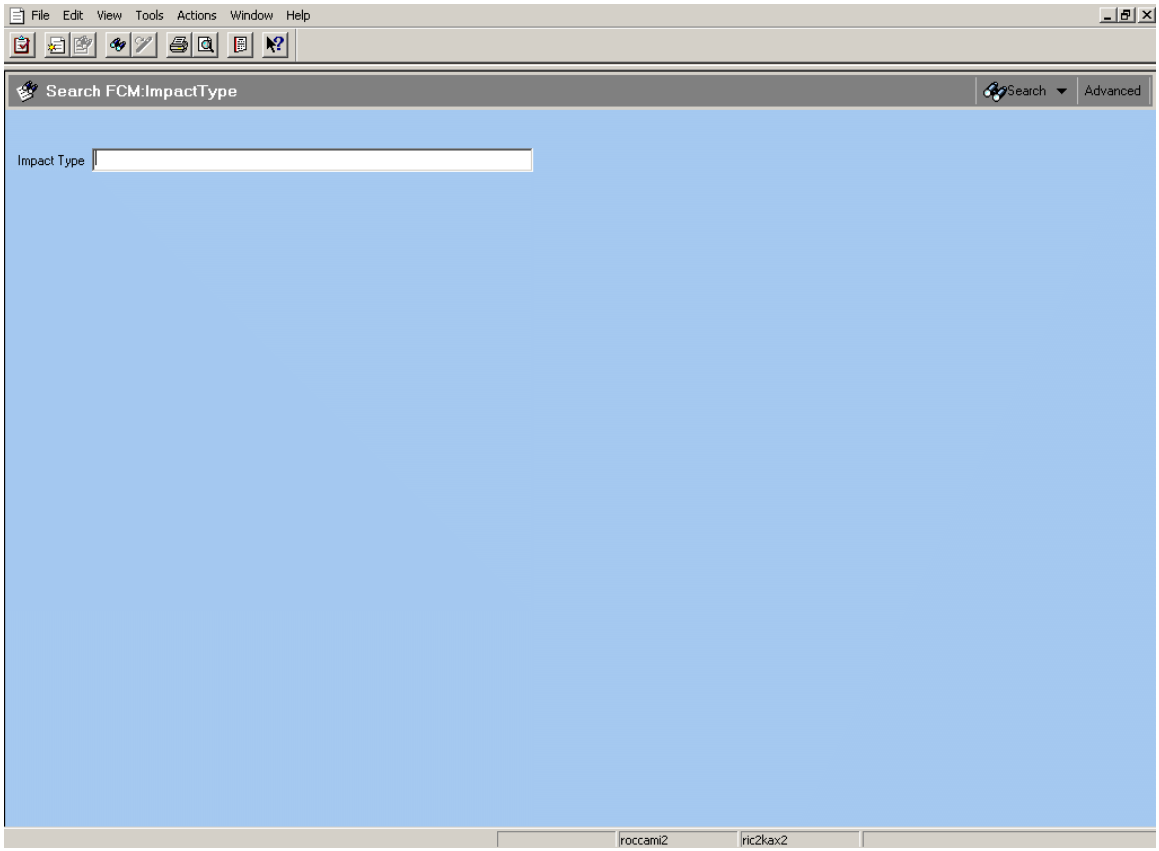
#	Maintenance Item	Instructions/Comments
2	Impact Types	Applies to ISR Types of 'ENH', 'EWO', 'FIX', 'INF', 'MSR', 'LMR': Tab Name: ISR Details Group Name: Create ISR Field Name: Impact Type Allows adding/modifying/deleting the options shown in the dropdown list for 'Impact Type' field. Impact Types is a character field and can contain up to 69 characters. Note: Consult Remedy developer/administrator before using this facility. There is currently no system impact if an 'Impact Type' is added. However, there is system impact if an 'Impact Type' is modified or deleted.

Double click on 'Impact Types' and the screen shown below is displayed.

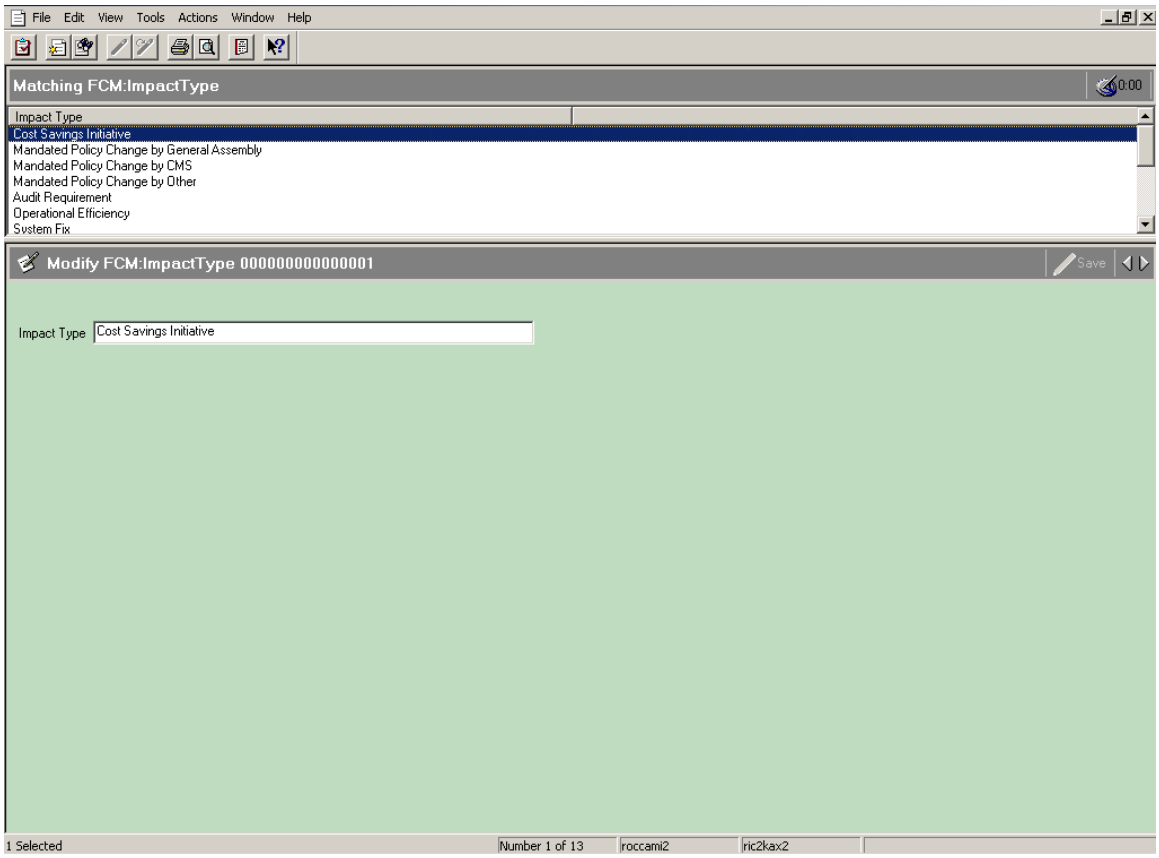


- 'Add' Entry – Click on 'New Request' icon (second icon near top left corner), enter the new 'Impact Type' info, and 'Save' the entry.
- 'Modify' entry - Locate the required entry, make the changes, and 'Save' the entry.

- 'Delete' entry – Click on 'New Search' icon (third icon near top left corner). Screen shown below appears.



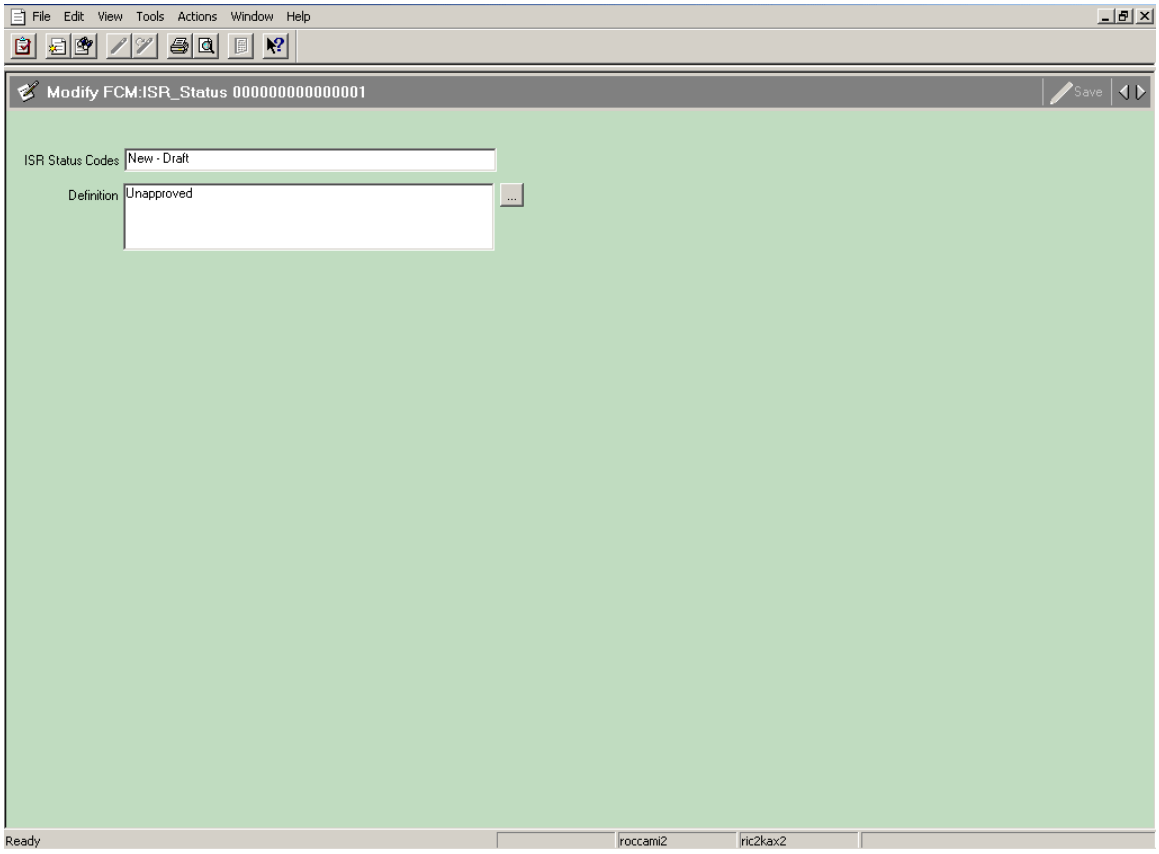
Enter the required 'Impact Type' (eg. Political), and click on 'Search' button. Screen shown below appears.



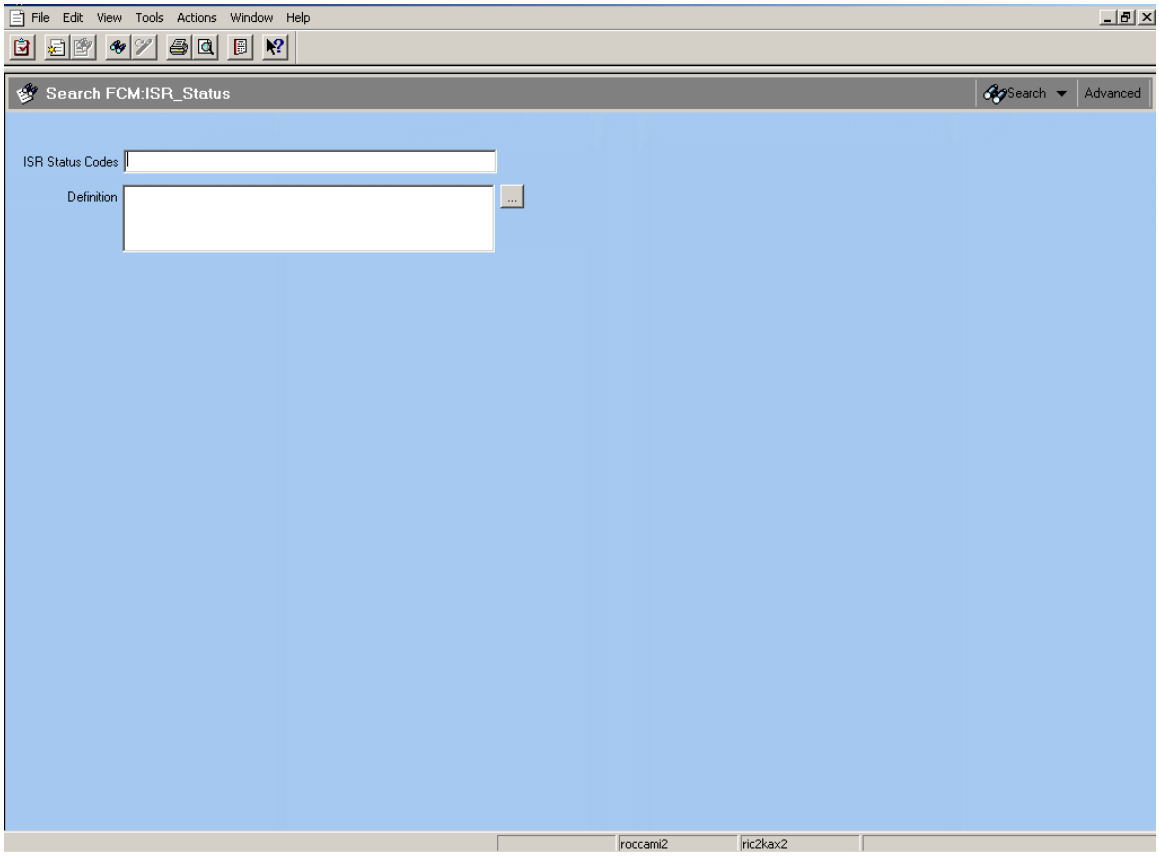
Entry to be deleted is highlighted in the top frame and its details shown in the bottom frame (in this case, the 'Impact Type' is the only detail). Select 'Actions' from menu at top of screen and 'Delete' from the dropdown list to delete the entry.

#	Maintenance Item	Instructions/Comments
3	ISR Status Codes	Applies to all ISR Types for 'ISR Status' field (located above the tabs). Allows adding/modifying/deleting the options shown in the dropdown list for 'ISR Status' field. ISR Status Codes is a character field and can contain up to 69 characters. Note: Consult Remedy developer/administrator before using this facility. There is system impact if an 'ISR Status Code' is added, modified, or deleted.
3a	Definition	Any letters, numbers, symbols or keywords can be accepted. Definition is a character field and can contain 250 characters.

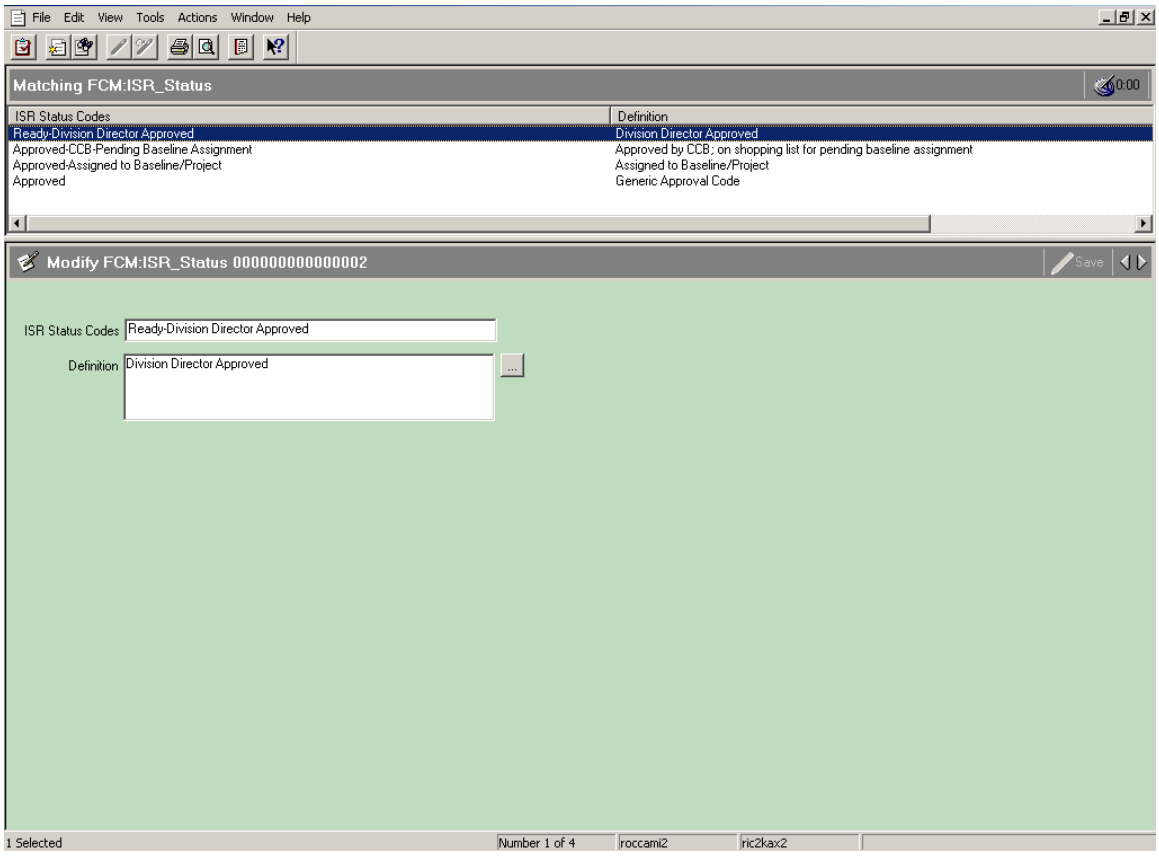
Double click on 'ISR Status Codes' and the screen shown below is displayed.



- 'Add' Entry – Click on 'New Request' icon (second icon near top left corner), enter the new 'ISR Status Code' info, and 'Save' the entry.
- 'Modify' entry - Locate the required entry, make the changes, and 'Save' the entry.
- 'Delete' entry – Click on 'New Search' icon (third icon near top left corner). Screen shown below appears.



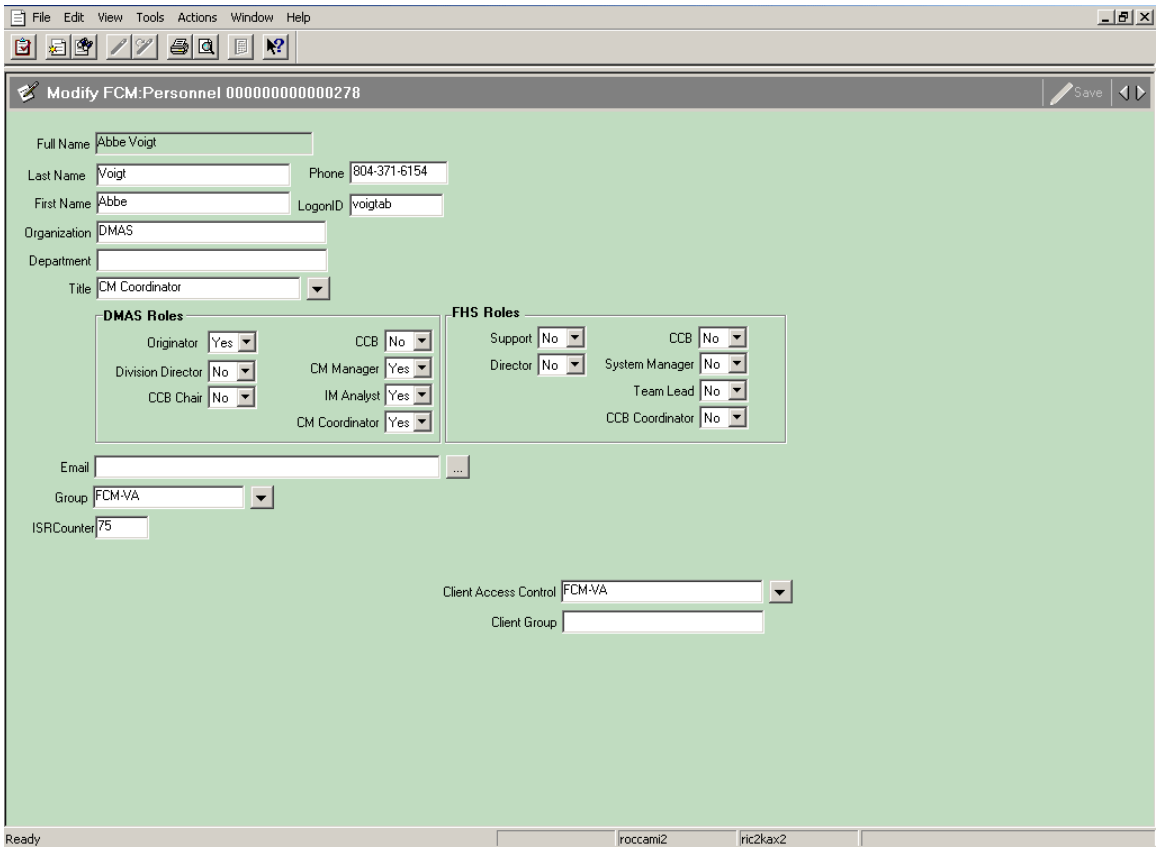
Enter the required 'ISR Status Code' (eg. Approved), and click on 'Search' button. Screen shown below appears.



Entry to be deleted is highlighted in the top frame and its details shown in the bottom frame. Select 'Actions' from menu at top of screen and 'Delete' from the dropdown list to delete the entry.

#	Maintenance Item	Instructions/Comments
4	Personnel	Applies to all ISR Types for all name related fields. Allows adding/modifying/deleting the options shown in the dropdown list for the name related fields. Note: Consult Remedy developer/administrator before using this facility. There is currently no system impact if a new 'Personnel' is added but care is to be taken to assign the correct 'Role'. However, there is system impact if 'Personnel' is modified or deleted.

Double click on 'Personnel' and the screen shown below is displayed.

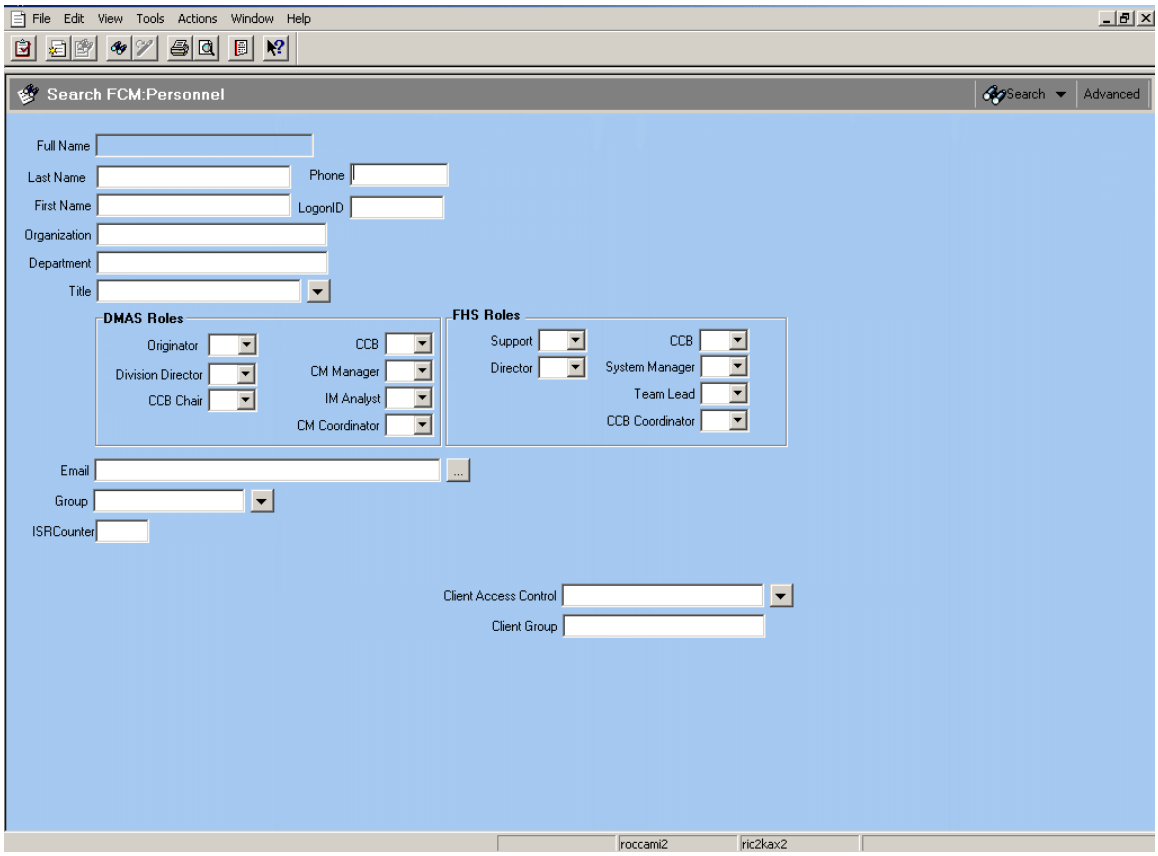


#	Tab Name	Group Name	Field Name	Instructions/Comments
1	Personnel		Full Name	Displays First Name and Last Name fields. Full Name is a character field and can contain up to 69 characters.
2	Personnel		Last Name	Type letters, numbers, symbols or keywords. Last Name is a character field and can contain up to 50 characters.

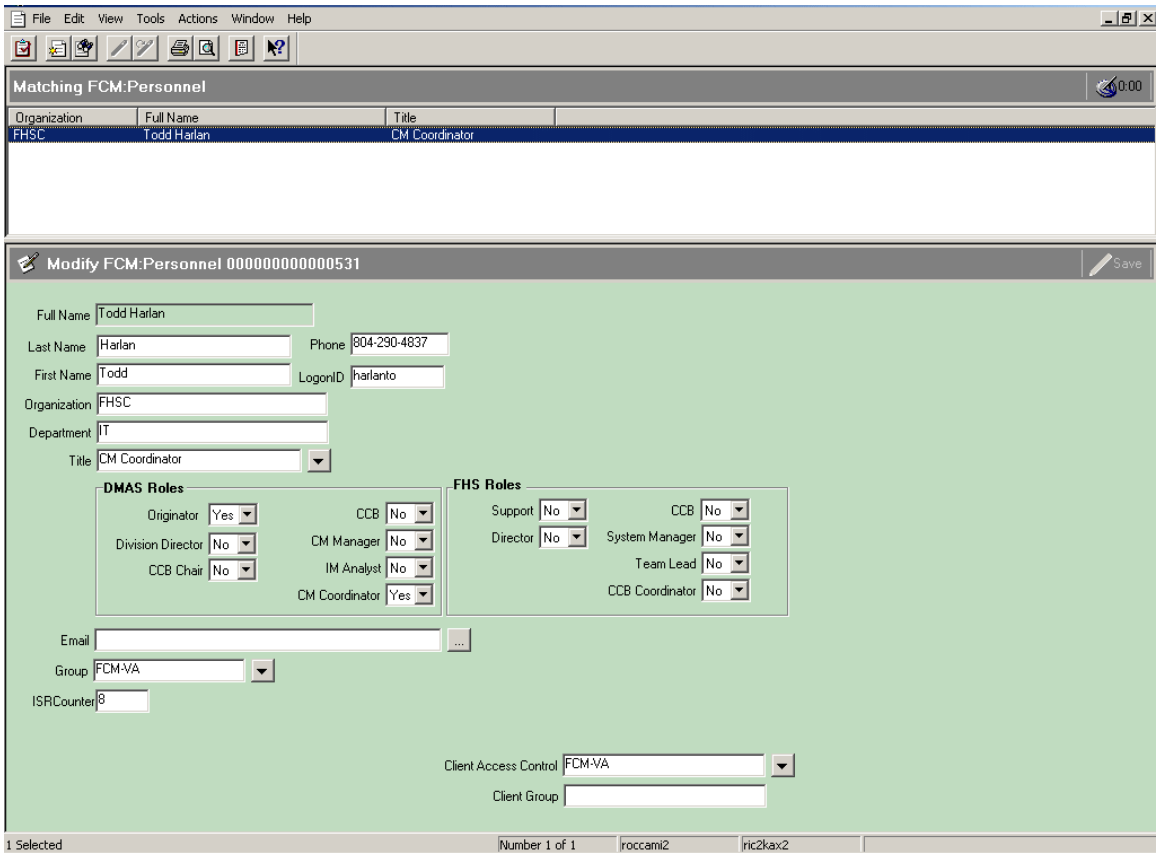
3	Personnel		Phone	Phone number can be accepted. The Phone field can contain 15 characters.
4	Personnel		First Name	Type letters, numbers, symbols or keywords. Last Name is a character field and can contain up to 50 characters.
5	Personnel		LogonID	Type letters, numbers, symbols or keywords. LogonID is a character field and can contain up to 25 characters.
6	Personnel		Organization	Type letters, numbers, symbols or keywords. Organization is a character field and can contain up to 50 characters.
7	Personnel		Department	Type letters, numbers, symbols or keywords. Department is a character field and can contain up to 50 characters.
8	Personnel		Title	Type letters, numbers, symbols or keywords or select from drop-down list of FCM:MNU:Titles. Title is a character field and can contain up to 50 characters.
9	Personnel	DMAS Roles	Originator	Originator is a selection field. Selection type include: 'Yes', 'No' or '(clear)'.
10	Personnel	DMAS Roles	CCB	CCB is a selection field. Selection type include: 'Yes', 'No' or '(clear)'.
11	Personnel	DMAS Roles	Division Director	Division Director is a selection field. Selection type include: 'Yes', 'No' or '(clear)'.
12	Personnel	DMAS Roles	CM Manager	CM Manager is a selection field. Selection type include: 'Yes', 'No' or '(clear)'.
13	Personnel	DMAS Roles	CCB Chair	CCB Chair is a selection field. Selection type include: 'Yes', 'No' or '(clear)'.
14	Personnel	DMAS Roles	IM Analyst	IM Analyst is a selection field. Selection type include: 'Yes', 'No' or '(clear)'.
15	Personnel	DMAS Roles	CM Coordinator	CM Coordinator is a selection field. Selection type include: 'Yes', 'No' or '(clear)'.
16	Personnel	FHS Roles	Support	Support is a selection field. Selection type include: 'Yes', 'No' or '(clear)'.
17	Personnel	FHS Roles	CCB	CCB is a selection field. Selection type include: 'Yes', 'No' or

				'(clear)'.
18	Personnel	FHS Roles	Director	Director is a selection field. Selection type include: 'Yes', 'No' or '(clear)'.
19	Personnel	FHS Roles	System Manager	System Manager is a selection field. Selection type include: 'Yes', 'No' or '(clear)'.
20	Personnel	FHS Roles	Team Lead	Team Lead is a selection field. Selection type include: 'Yes', 'No' or '(clear)'.
21	Personnel	FHS Roles	CCB Coordinator	CCB Coordinator is a selection field. Selection type include: 'Yes', 'No' or '(clear)'.
22	Personnel		Email	Type letters, numbers, symbols or keywords. Email is a character field and can contain up to 100 characters.
23	Personnel		Group	Type letters, numbers, symbols or keywords or select from drop-down list of FCM:MNU:WorkGroups. Group is a character field and can contain up to 30 characters.
24	Personnel		ISRCounter	A number can be accepted between 0 and 2,147,483,647 to modify the field. ISRCounter is an Integer field.
25	Personnel		Client Access Control	Select from drop-down list. The selections are Administrator, Browser, Customize, FCM-Global, FCM-VA, FCM-VA-CCM, FCM-VA-OTH, Public, Sub Administrator. Client Access Control is a character field.
26	Personnel		Client Group	Type letters, numbers, symbols or keywords. Client Group is a character field and can contain up to 30 characters.

- 'Add' Entry – Click on 'New Request' icon (second icon near top left corner), enter the new 'Personnel' info, and 'Save' the entry.
- 'Modify' entry - Locate the required entry, make the changes, and 'Save' the entry.
- 'Delete' entry – Click on 'New Search' icon (third icon near top left corner). Screen SearchFCM:Personnel shown below appears.



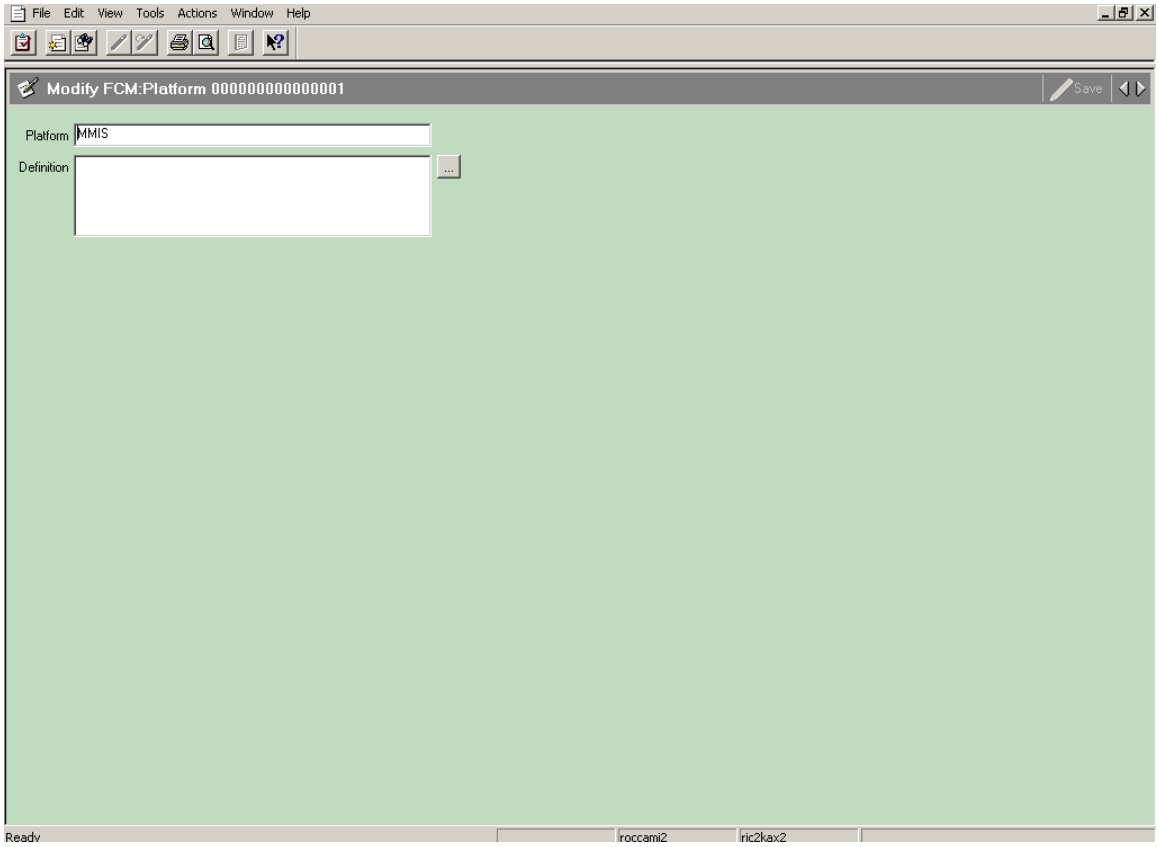
Enter the required 'Personnel' info (eg. 'Last Name' of 'Harlan'), and click on 'Search' button. Screen shown below appears.



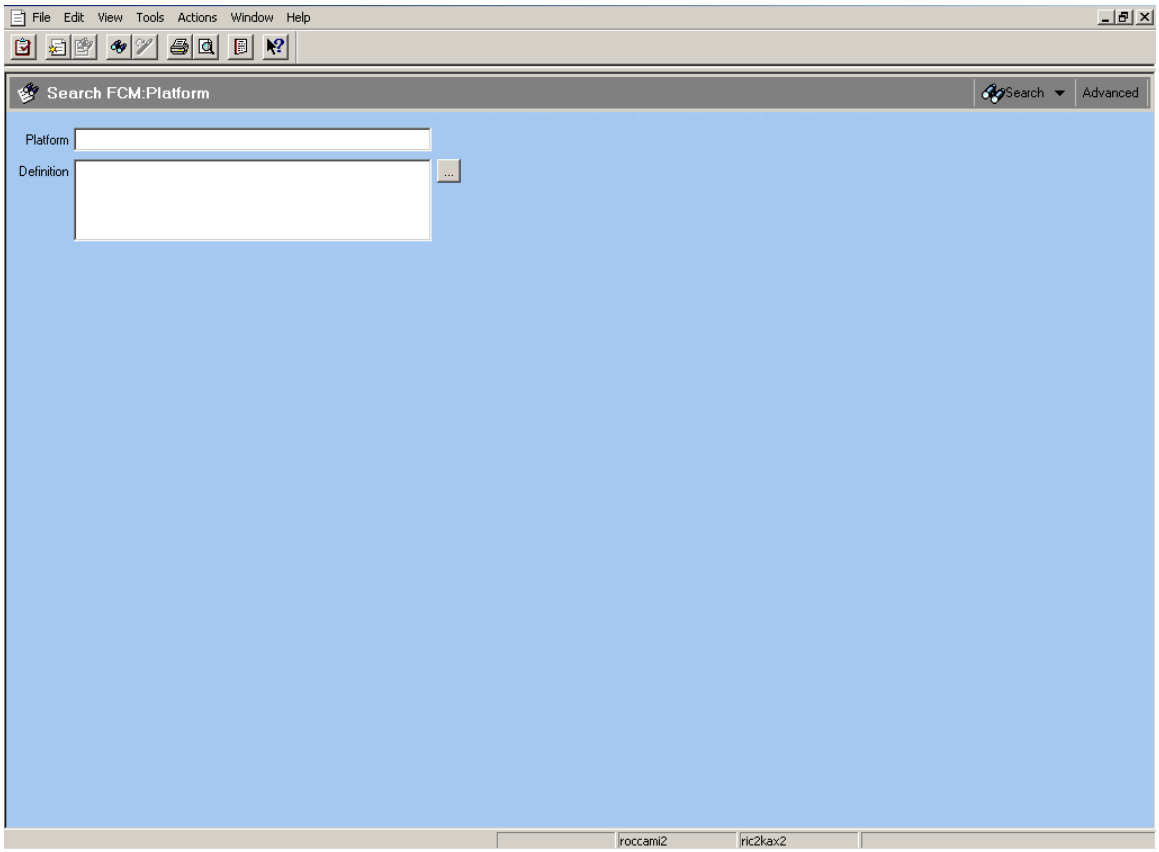
Entry to be deleted is highlighted in the top frame and its details shown in the bottom frame. Select 'Actions' from menu at top of screen and 'Delete' from the dropdown list to delete the entry.

#	Maintenance Item	Instructions/Comments
5	Platforms	Applies to all ISR Types for 'Platform' field (located above the tabs). Allows adding/modifying/deleting the options shown in the dropdown list for 'Platform' field. Platform is a character field that can contain up to 69 characters. Note: Consult Remedy developer/administrator before using this facility. There is major system impact if 'Platform' is added, modified, or deleted.
5a	Definition	Any letters, numbers, symbols or keywords can be accepted. Definition is a character field and can contain 250 characters.

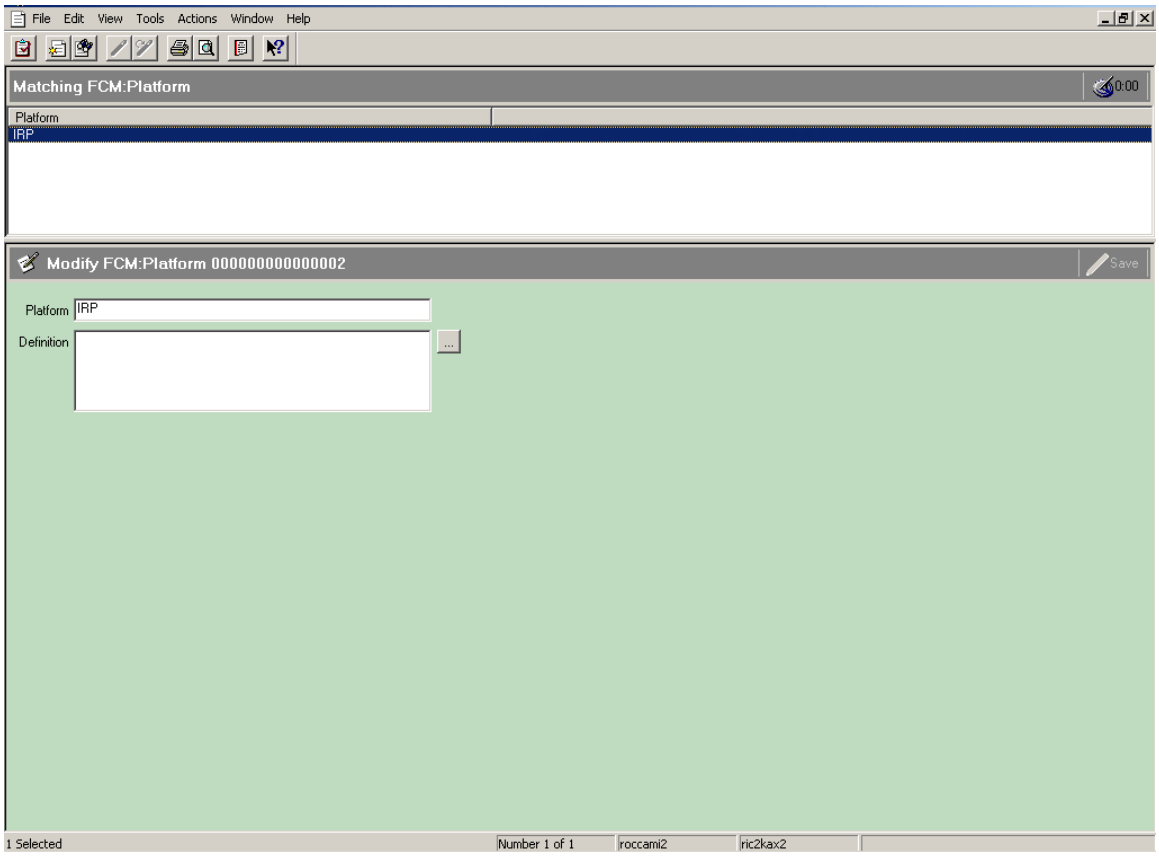
Double click on 'Platforms' and the screen shown below is displayed.



- 'Add' Entry – Click on 'New Request' icon (second icon near top left corner), enter the new 'Platform' info, and 'Save' the entry.
- 'Modify' entry - Locate the required entry, make the changes, and 'Save' the entry.
- 'Delete' entry – Click on 'New Search' icon (third icon near top left corner). Screen shown below appears.



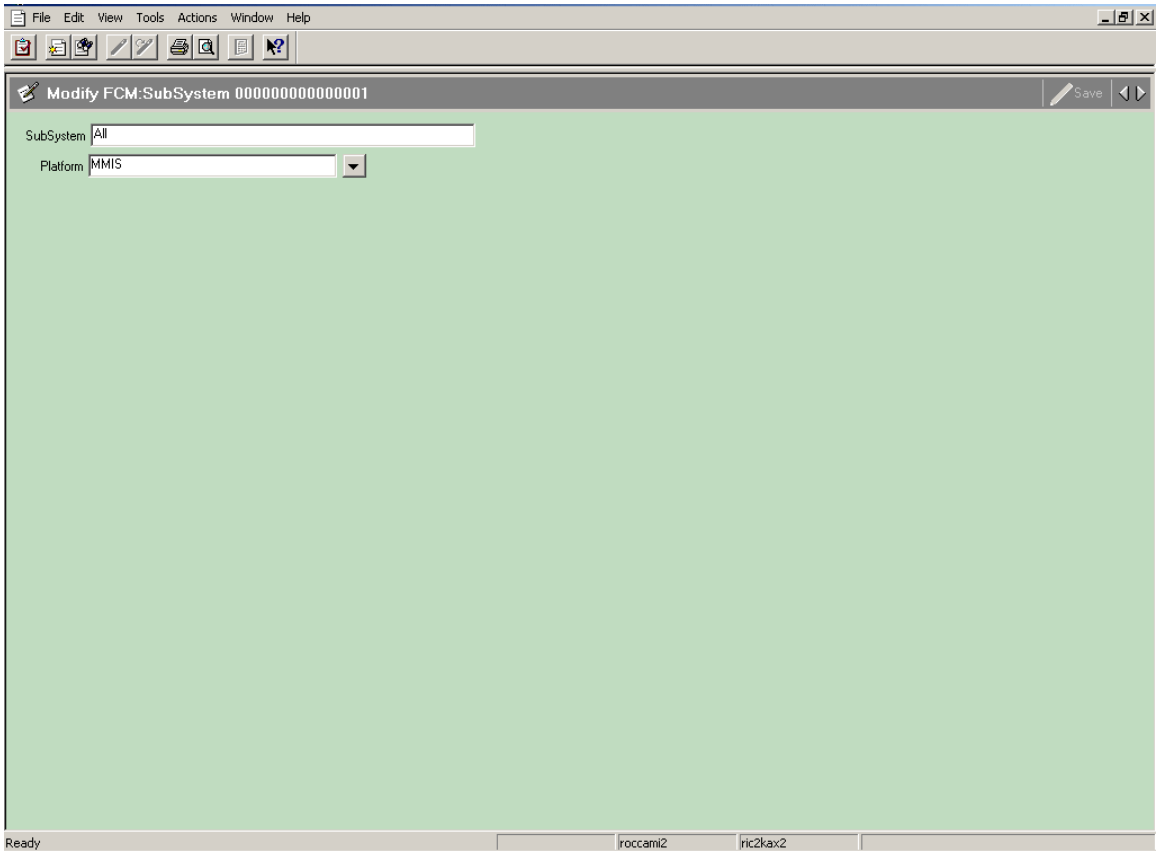
Enter the required 'Platform' (eg. IRP), and click on 'Search' button. Screen shown below appears.



Entry to be deleted is highlighted in the top frame and its details shown in the bottom frame. Select 'Actions' from menu at top of screen and 'Delete' from the dropdown list to delete the entry.

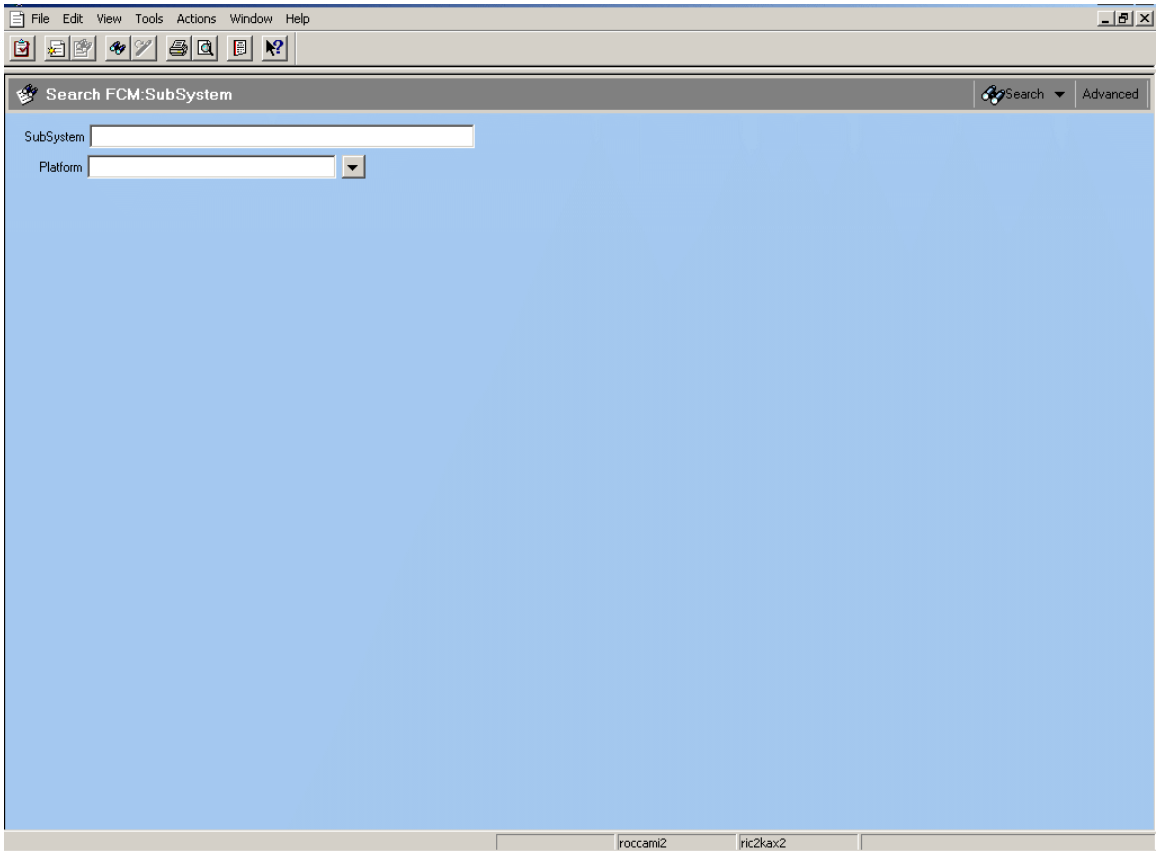
#	Maintenance Item	Instructions/Comments
6	Subsystems	Applies to ISR Types of 'ENH', 'EWO', 'FIX', 'INF', 'MSR', 'LMR': Tab Name: ISR Details Group Name: Create ISR Field Name: Subsystem Allows adding/modifying/deleting the options shown in the dropdown list for 'Subsystem' field. Subsystems is a character field that can contain up to 69 characters. Note: Consult Remedy developer/administrator before using this facility. There is currently no system impact if a 'Subsystem' is added. However, there is system impact if 'Subsystem' is modified or deleted.
6a	Platform	Select platform from FCM:MNU:Platform list.

Double click on 'Subsystems' and the screen shown below is displayed.

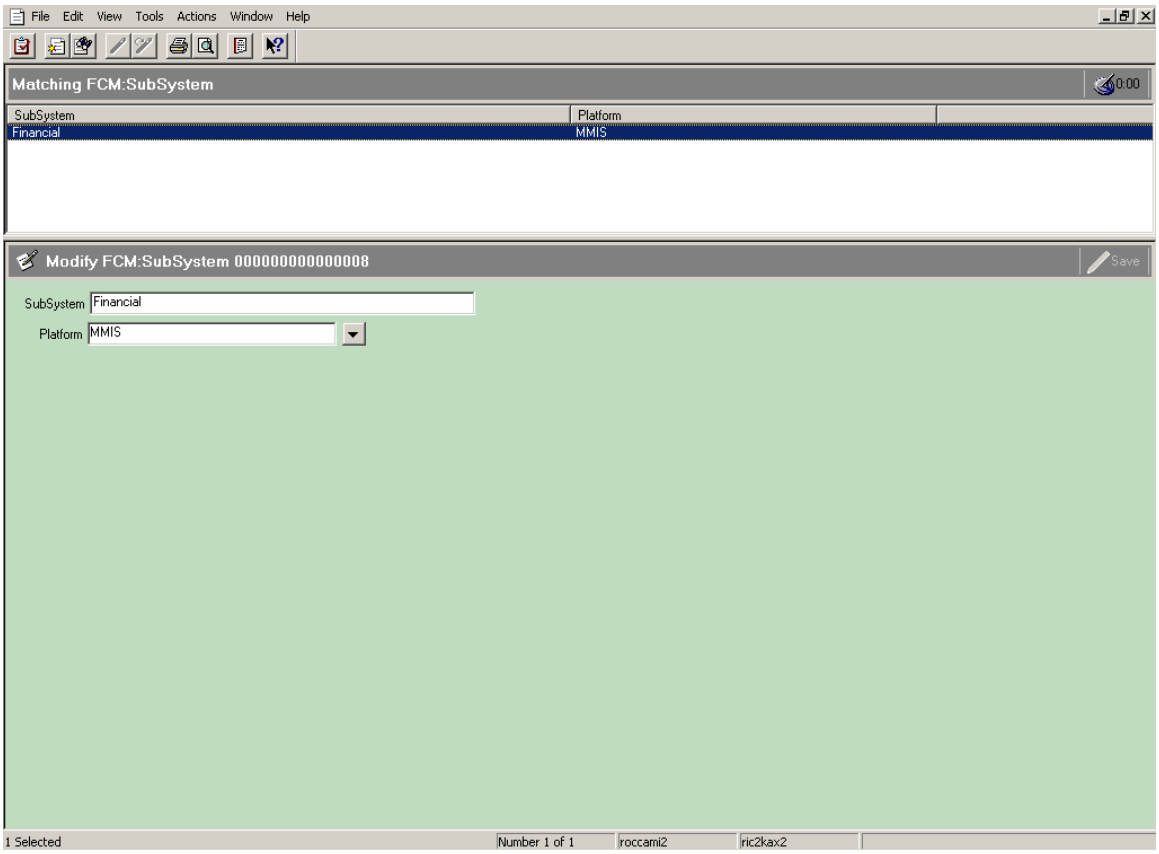


- 'Add' Entry – Click on 'New Request' icon (second icon near top left corner), enter the new 'Subsystem' info, and 'Save' the entry.

- 'Modify' entry - Locate the required entry, make the changes, and 'Save' the entry.
- 'Delete' entry – Click on 'New Search' icon (third icon near top left corner). Screen shown below appears.



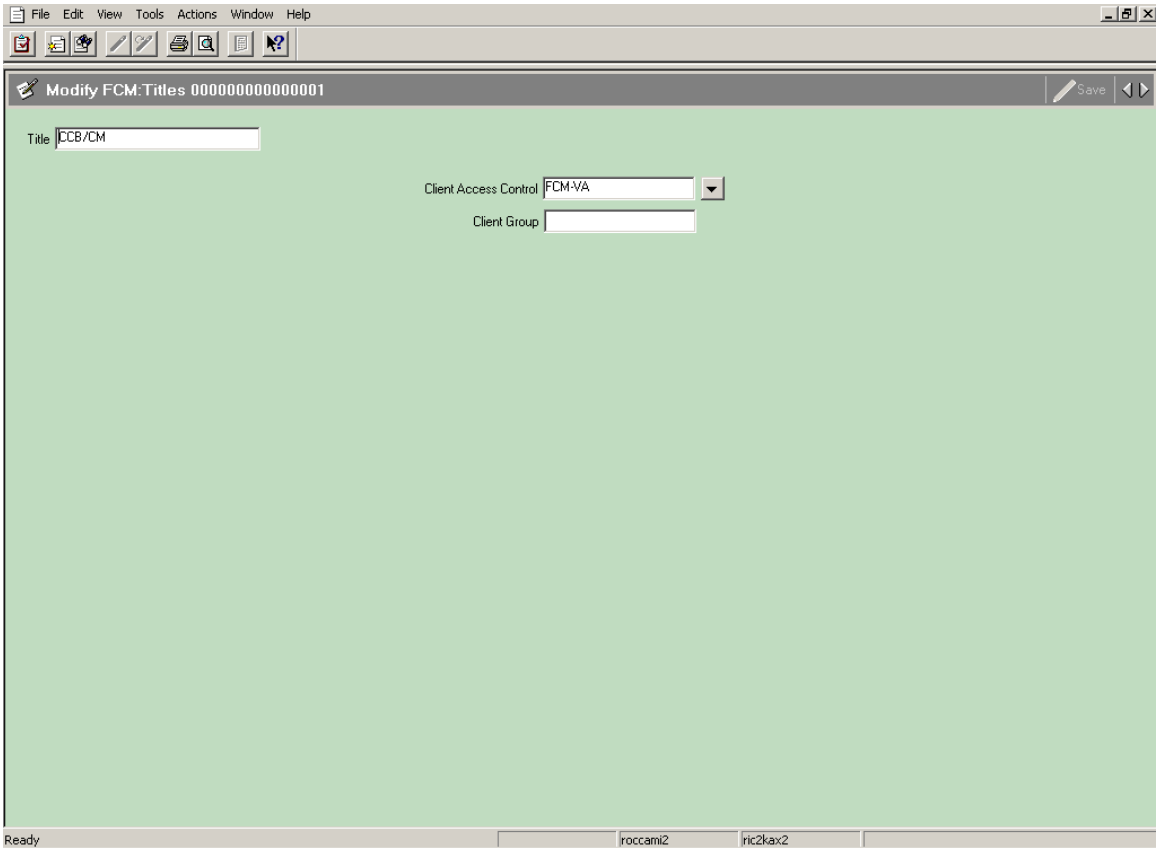
Enter the required 'Subsystem' (eg. Financial), and click on 'Search' button. Screen shown below appears.



Entry to be deleted is highlighted in the top frame and its details shown in the bottom frame. Select 'Actions' from menu at top of screen and 'Delete' from the dropdown list to delete the entry.

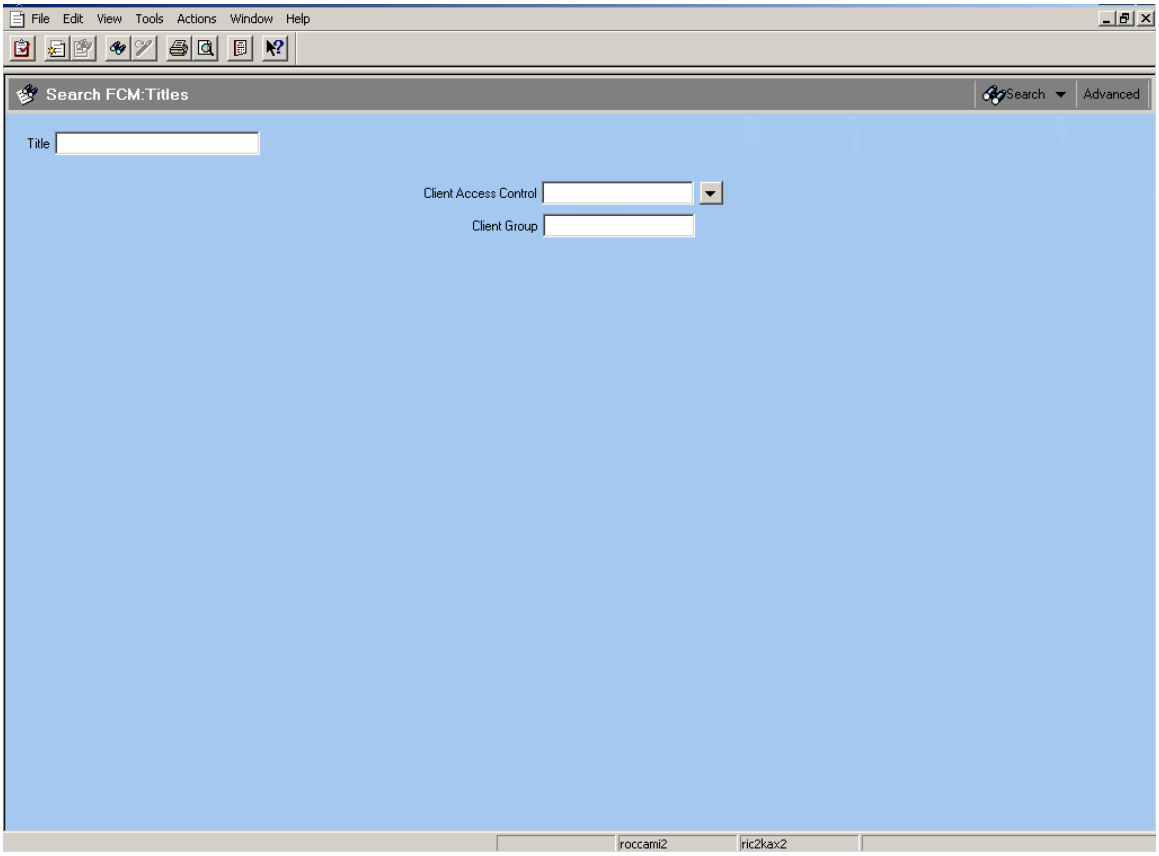
#	Maintenance Item	Instructions/Comments
7	Titles	Allows adding/modifying/deleting the options shown in the dropdown list for 'Title' field (refer to 'Personnel' Maintenance Item). Title is a character field and can contain up to 50 characters. Note: Consult Remedy developer/administrator before using this facility. There is currently no system impact if a 'Title' is added. However, there is system impact if 'Title' is modified or deleted.
7a	Client Access Control	Select from drop-down list. The selections are Administrator, Browser, Customize, FCM-Global, FCM-VA, FCM-VA-CCM, FCM-VA-OTH, Public, Sub Administrator. Client Access Control is a character field.
7b	Client Group	Type letters, numbers, symbols or keywords. Client Group is a character field and can contain up to 30 characters.

When 'Titles' is doubled clicked, FCM:Title screen shown below is displayed.

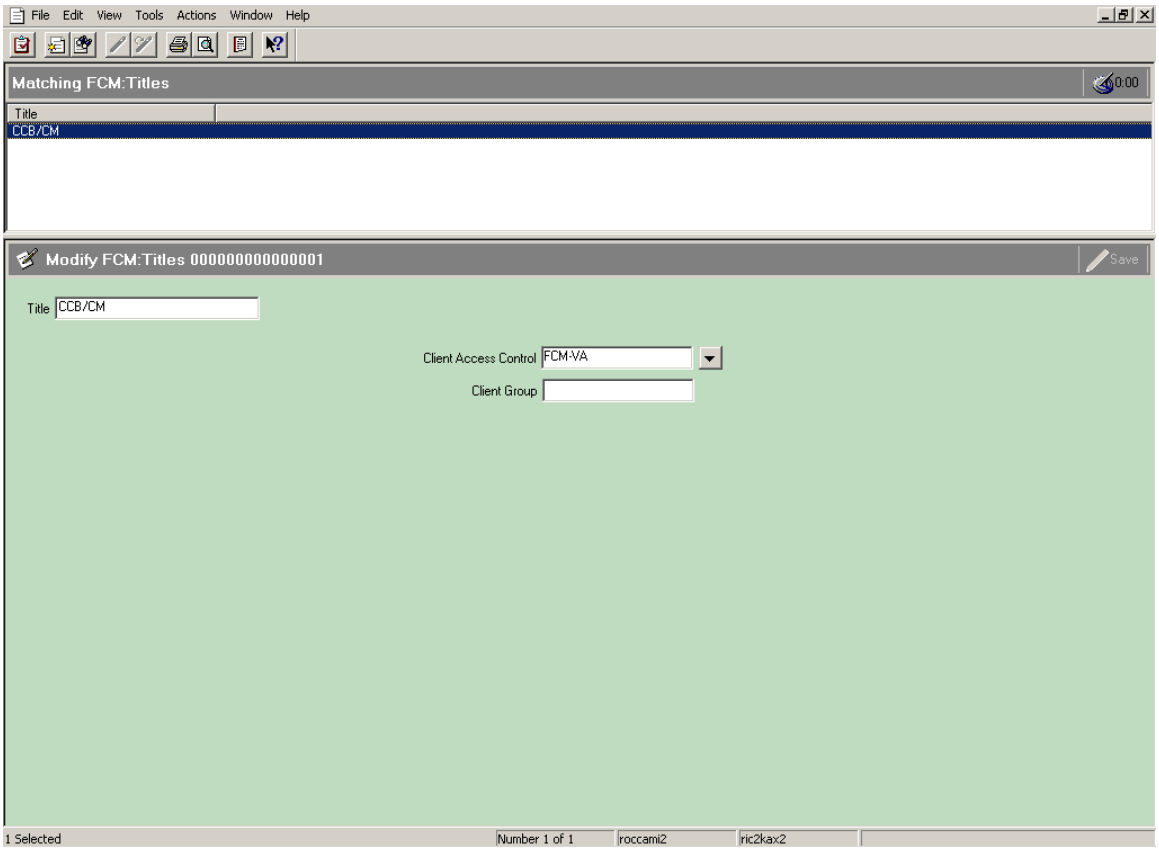


- 'Add' Entry – Click on 'New Request' icon (second icon near top left corner), enter the new 'Title' info, and 'Save' the entry.
- 'Modify' entry - Locate the required entry, make the changes, and 'Save' the entry.

- 'Delete' entry – Click on 'New Search' icon (third icon near top left corner). Screen shown below appears.

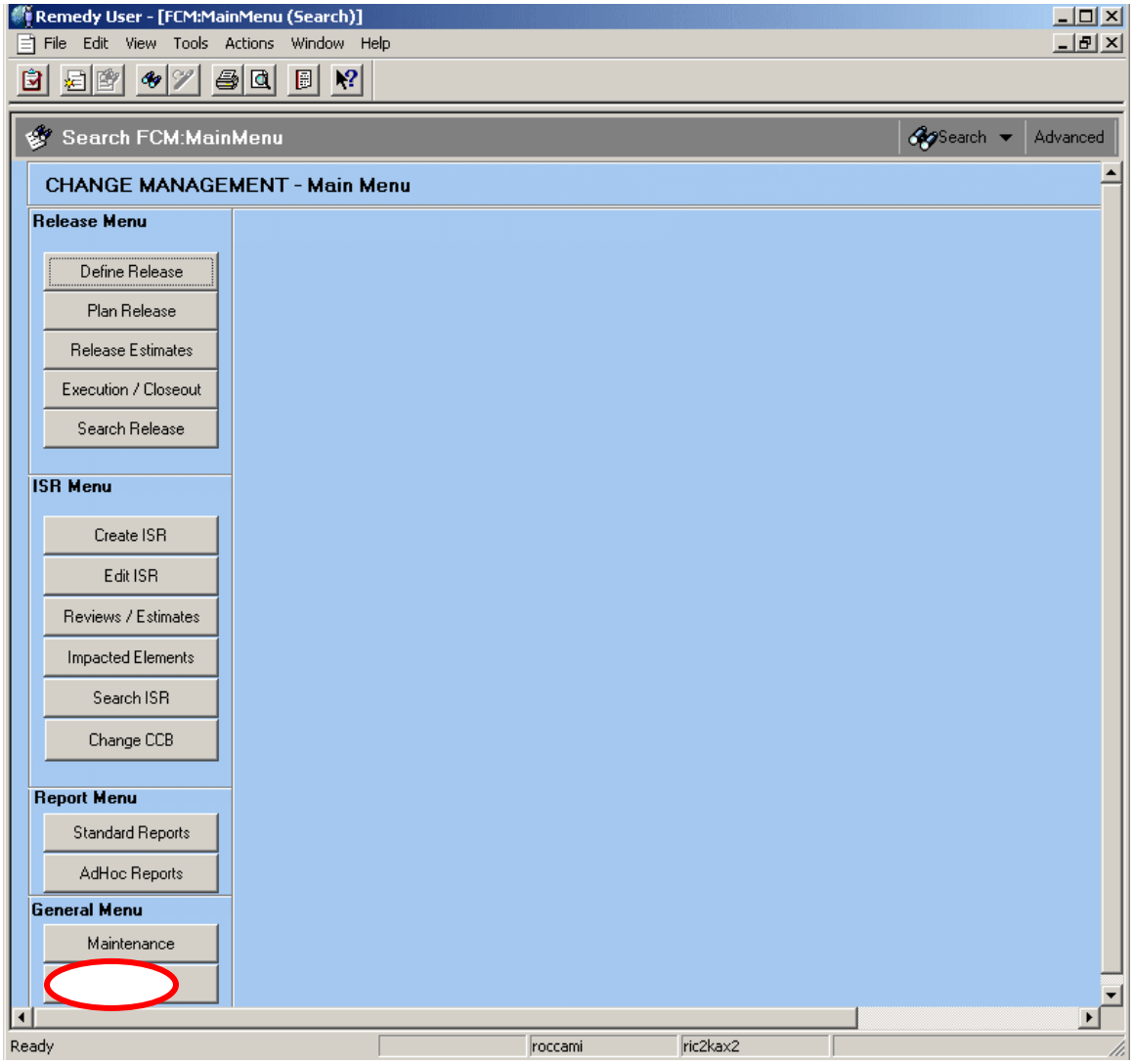


When the required 'Title' info (eg. Originator) is entered and 'Search' button is clicked, a query is created and executed. FCM:Titles Screen shown below appears with queried information.



Entry to be deleted is highlighted in the top frame and its details shown in the bottom frame (in this case, the 'Title' is the only detail). Select 'Actions' from menu at top of screen and 'Delete' from the dropdown list to delete the entry.

General Menu – 'Log Out'



- When 'Log Out' is clicked, the AR System User Screen is displayed. When the 'X' in top right corner to exit Remedy is clicked, returned to desktop.

Report Requirements:

1.1	**Active Releases Sent to FHSC**			**Selection Criteria:** **Release Status = Project-Submit-Approved, Project-Decision, Project-Approved, Project-In-Progress** **Sort Criteria:** **Release # (Ascending)**
		Release #	Release No.	
		Project Title	Release Title	
		Status	Release Status	
		Date to FHS	CCB/CM Approval Date	This information is to be obtained from the 'Define / Plan Release' tab of the Release form.
		DMAS/FHS Analysts	DMAS Team Lead; FHS Team Lead	This information is to be obtained from the 'Release Estimates' tab of the Release form.
		ISR#s Assigned	ISR Number	List all 'ISR Number' present in 'Assigned ISRs' table
		ISR Title	ISR Title	List all 'ISR Title' (against appropriate ISR Number) present in 'Assigned ISRs' table
		Est. IA Hours	Est. Effort (Hours)	List all 'Est. Effort (Hours)' (against appropriate ISR Number) present in 'Assigned ISRs' table This information is to be obtained from the 'Define / Plan Release' tab of the Release form.
		~~Release Notes~~	~~Release Notes~~	
		Total Release Est. Hours	Total Estimated Hours	This information is to be obtained from the 'Define / Plan Release' tab of the Release form. This is to be present once for each Release.
		~~Date to FHS~~	~~CCB Approval Date~~	
1.1.1	**Active Release Detail Report by ISR**			**New Report.** **Selection Criteria:** **Release Status = Project-Submit-Approved, Project-Decision, Project-Approved, Project-In-Progress** **Sort Criteria:** **Release # (Ascending)**
		Release #	Release No.	

		Release Title	Release Title	
		Release Status	Release Status	
		DMAS Team Lead	DMAS Team Lead	This information is to be obtained from the 'Release Estimates' tab of the Release form.
		FHS Team Lead	FHS Team Lead	This information is to be obtained from the 'Release Estimates' tab of the Release form.
		ISR #	ISR Number	
		Title/ Originator	ISR Title; Originator;	
		ISR Comments	ISR Notes	
		DMAS Analyst	DMAS Analyst	
		Description	Change Description	
1.2	**MMIS Active ISRs By FH Scheduled Completion Date**			**Selection Criteria:** **Platform = MMIS** **ISR Type = ENH, EWO** **ISR Status = Approved, In-Progress** **Sort Criteria:** **FH Scheduled Delivery Date (Ascending)** **ISR # (Ascending)**
		FH Scheduled Delivery Date	Agreed Delivery Date	Appropriate 'Agreed Delivery Date' for ISR #.
		CCB Priority	CCB Priority	Appropriate 'CCB Priority' for ISR #.
		ISR #	ISR Number	List all 'ISR Number' present in 'Assigned ISRs' table.
		Title	ISR Title	Appropriate 'ISR Title' for ISR #.
		DMAS Analyst; Contacts	DMAS Analyst; Contacts	Appropriate 'DMAS Analyst' and 'Contacts' associated with ISR #.
		FH Team Lead; Resources	FHS Team Lead; Resources	Appropriate 'FHS Team Lead' and 'Resources' associated with ISR #.

2.1	**Active ISRs By DMAS Analyst (Also requires Summary page)** **Note: Summary is required by Analyst Name, ISRs column (excl. MSR/LMR), MSRs/LMRs column, Total column**			**Selection Criteria for DMAS Analyst:** **Platform = MMIS, IRP, OTHER** **ISR Type = FIX, ENH, EWO, INF, MSR, LMR** **ISR Status = Ready-Division Director Approved, Ready-For CCB, Approved-CCB-Pending Baseline Assignment, Approved-Assigned to Baseline/Project, Approved, In-Progress** **Sort Criteria:** **Platform (Ascending)** **Status (Ascending)** **CCB Priority (Ascending)** **ISR Number (Ascending)**
		Status	ISR Status	List ISRs by 'Platform' and 'ISR Status'.
		ISR Number	ISR Number	
		ISR Type	ISR Type	
		CCB Priority	CCB Priority	
		Title	ISR Title	
		Requested Completion Date	Requested Completion Date	
		Mandatory Date	CCB/CM Mandatory Date	
		Total For	DMAS Analyst	Count of ISRs for Analyst
2.2	**Active ISRs By FHSC Analyst (Also requires Summary page)** **Note: Summary is required by**			**Selection Criteria for FHSC Analyst:** **Platform = MMIS, IRP, OTHER** **ISR Type = FIX, ENH, EWO, INF, MSR, LMR** **ISR Status = Ready-Division Director Approved, Ready-For CCB, Approved-CCB-Pending Baseline Assignment, Approved-Assigned to Baseline/Project, Approved, In-Progress**

	Analyst Name, ISRs column (excl. MSR/LMR), MSRs/LMRs column, Total column			**Sort Criteria:** **Platform (Ascending)** **Status (Ascending)** **CCB Priority (Ascending)** **ISR Number (Ascending)**
		Status	ISR Status	List ISRs by Platform and ISR Status.
		ISR Number	ISR Number	
		Type	ISR Type	
		CCB Priority	CCB Priority	
		Title	ISR Title	
		Requested Completion Date	Requested Completion Date	
		Mandatory Date	CCB/CM Mandatory Date	
		Total For	FHSC Team Lead	Count of ISRs for Analyst
2.3	**Active MMIS Priority ISRs By DMAS Analyst (Also requires Summary page)**			**Selection Criteria for DMAS Analyst:** **Platform = MMIS** **ISR Type = ENH, EWO** **ISR Status = Approved, In-Progress** **Sort Criteria:** **ISR Type (Descending i.e. EWO followed by ENH)** **CCB Priority (Ascending)** **ISR Number (Ascending)**
		ISR Type	ISR Type	
		CCB Priority	CCB Priority	
		ISR Number	ISR Number	
		Title	ISR Title	
		Requested Completion	Requested Completion Date	

		Date		
		Mandatory Date	CCB/CM Mandatory Date	
		Total For		Count of ISRs for Analyst
2.4	**Active MMIS Priority ISRs By FHSC Analyst (Also requires Summary page)**			**Selection Criteria for FHSC Analyst:** **Platform = MMIS** **ISR Type = ENH, EWO** **ISR Status = Approved, In-Progress** **Sort Criteria:** **ISR Type (Descending i.e. EWO followed by ENH)** **CCB Priority (Ascending)** **ISR Number (Ascending)**
		ISR Type	ISR Type	
		ISR Number	ISR Number	
		CCB Priority	CCB Priority	
		Title	ISR Title	
		Requested Completion Date	Requested Completion Date	
		Mandatory Date	CCB/CM Mandatory Date	
		Total For		Count of ISRs for Analyst
3.1	**VAMMIS Problem/Research~~/MSR~~ Log**			**Selection Criteria:** **Platform = MMIS** **ISR Type = FIX, INF** **ISR Status = Approved, In-Progress** **Sort Criteria:** **Date Reported (Ascending)** **ISR # (Ascending)**
		ISR #/ Change Type /	ISR Number; ISR Type; ISR Status	Make the top left corner always say ACTIVE with Status being reflected in first column.

		Status		
		Date Reported	Open Date	
		Title / Description	ISR Title; Change Description	
		DMAS/Requestor	Originator; Contacts	
		First Health Team Lead; Resources	DMAS Analyst; FHS Team Lead; Resources	
		Date Sent to FH	CCB/CM Date Sent to FHS	
		Action	ISR Notes	
		DMAS Requested Date	Requested Completion Date	
		First Health Scheduled Date	Agreed Delivery Date	
3.2	**IRP & Other Problem/Research~~/MSR~~ Log**			**Selection Criteria:** **Platform = IRP, Other** **ISR Type = FIX, INF, ENH (effort =< 4hrs)** **ISR Status = Approved, In-Progress** **Sort Criteria:** **Date Reported (Ascending)** **ISR # (Ascending)**
		ISR #/ ISR Type / Status	ISR Number; ISR Type; ISR Status	Make the top left corner always say ACTIVE with Status being reflected in first column.
		Date Reported	Open Date	
		Title / Description	ISR Title; Change Description	
		DMAS Analyst	Originator; Contacts	
		DMAS Analysts /	DMAS Analyst; FHS Team Lead;	

		First Health Resources	Resources	
		Date Sent to FHSC	CCB/CM Date Sent for Action	
		Action	ISR Notes	
		DMAS Requested Date	Requested Completion Date	
		First Health Scheduled Date	Agreed Delivery Date	
3.3	**Active MSR Log**			**Selection Criteria:** **Platform = MMIS** **ISR Type = MSR** **ISR Status = Approved, In-Progress** **Sort Criteria:** **Date Reported (Ascending)** **ISR # (Ascending)**
		ISR #/Request Status	ISR Number Status	
		Date Reported	Open Date	
		Title / Description	ISR Title; Change Description	
		Requestor	Originator; Contacts	
		Claims Status	Claim Status	
		DMAS Analysts / First Health Resources	DMAS Analyst; FHS Team Lead; Resources	
		Date Sent to FHSC	CCB/CM Date Sent to FHS	
		Action	ISR Notes	
		DMAS Requested Date	Requested Completion Date	

		First Health Scheduled Date	Agreed Delivery Date	
3.3.1	**Active MSRs for DMAS Action As Of ……**			**New Report (same format as 3.3).** **Selection Criteria:** **Platform = MMIS** **ISR Type = MSR** **ISR Status = Approved, In-Progress** **FHSC/DMAS Update = DMAS** **Sort Criteria:** **Date Reported (Ascending)** **ISR # (Ascending)**
3.3.2	**Active MSRs for FHSC Action As Of ……**			**New Report (same format as 3.3).** **Selection Criteria:** **Platform = MMIS** **ISR Type = MSR** **ISR Status = Approved, In-Progress** **FHSC/DMAS Update = FHSC** **Sort Criteria:** **Date Reported (Ascending)** **ISR # (Ascending)**
3.4	**Active Ad Hoc Request Log**			**Selection Criteria:** **Platform = IRP** **ISR Type = ADH** **ISR Status = Approved, In-Progress** **Sort Criteria:** **Date Reported (Ascending)** **ISR # (Ascending)**
		ISR #	ISR Number	
		Date Reported	Open Date	
		Title / Description	ISR Title; Change Description	

		DMAS Analyst/Originator; user Contacts	DMAS Analyst Originator; Contacts	
		First Health Team Lead Resources	FHS Team Lead; Resources	
		Date Sent to FHSC	CCB/CM Date Sent to FHS	
		Action	ISR Notes	
		DMAS Requested Date	Requested Completion Date	
		First Health Scheduled Date	Agreed Delivery Date	
4.1	**~~VAMMIS Work To Be Done~~ Active Emergency Work Orders**			**Selection Criteria:** **Platform = MMIS** **ISR Type = EWO** **ISR Status = Approved, In-Progress** **Sort Criteria:** **Priority (Ascending)** **ISR # (Ascending)**
		ISR #/ Change Type / Status / Project	ISR Number; ISR Type; ISR Status; User Project	Make the top left corner always say ACTIVE with Status being reflected in first column.
		Priority	CCB Priority	
		Title	ISR Title	
		Description / Impact if Disapproved	Change Description; Impact if Disapproved	
		DMAS Analyst / Originator / User	DMAS Analyst; Originator; Contacts	

		Contacts		
		First Health Team Lead / Resources	FHS Team Lead; Resources	
		Comments	ISR Notes	
		DMAS Approved Date / IA Approved Date	CCB/CM Approval Date; Date Approved by DMAS (Impact Assessment related field)	
		Date to First Health	CCB/CM Date Sent to FHS	
		DMAS Requested Date	Requested Completion Date	
		Mandatory Date	Agreed Delivery Date	
		FHSC Scheduled Date	CCB/CM Mandatory Date	
		Agreed Hours	Agreed Hours	
4.2	**IRP & Other Work To Be Done**			**Selection Criteria:** **Platform = IRP. Other** **ISR Type = EWO, ENH (effort > 4hrs)** **ISR Status = Approved, In-Progress** **Sort Criteria:** **Priority (Ascending)** **ISR # (Ascending)**
		ISR #/ Change Type / Status Project	ISR Number; ISR Type; ISR Status	Make the top left corner always say ACTIVE with Status being reflected in first column.
		Priority	CCB Priority	

		Project	User Project	
		Title	ISR Title	
		Change Description / Impact if Disapproved	Change Description; Impact if Disapproved	
		DMAS Analyst / Originator / User Contacts	DMAS Analyst; Originator; Contacts	
		First Health Team Lead / Resources	FHS Team Lead; Resources	
		Comments	ISR Notes	
		DMAS Approved Date / IA Approved Date	CCB/CM Approval Date; Date Approved by DMAS (Impact Assessment related field)	
		Date to First Health	CCB/CM Date Sent to FHS	
		Mandatory Date	Requested Completion Date	
		FH Scheduled Date	Agreed Delivery Date	
		DMAS Requested Date	CCB/CM Mandatory Date	
		Agreed Hours	Agreed Hours	
4.3	**VAMMIS Completed ISRs and MSRs**			**New Report.** **Selection Criteria:** **Platform = MMIS** **ISR Type = ENH, EWO, ~~INF,~~**

				LMR, MSR **~~Close Date or~~ Actual Delivery Date has date ~~entered~~ >= 06/16/2003** **ISR Status NOT = Closed-Cancelled** **Sort Criteria:** **ISR # (Ascending)**
		ISR #	ISR Number	
		ISR Type	ISR Type	
		Title / Description	ISR Title; Change Description	
		Requestor	Originator	
		Date Completed	~~Close Date (for INF, LMR, MSR) or~~ Actual Delivery Date ~~(for ENH, EWO)~~	
5.1				**Selection Criteria:** **CCB Priority = E1A** **Sort Criteria:** **ISR # (Ascending)**
		ISR #	ISR Number	
		Title / Description	ISR Title; Change Description	
		ISR Notes	ISR Notes	Change from 'New MMIS Comments' to 'ISR Notes'.
		Users	Originator; DMAS Analyst Contacts	
5.2				**Selection Criteria:** **CCB Priority = E1B** **Sort Criteria:** **ISR # (Ascending)**

		ISR #	ISR Number	
		Title / Description	ISR Title; Change Description	
		ISR Notes	ISR Notes	Change from 'New MMIS Comments' to 'ISR Notes'.
		Users	Originator; DMAS Analyst Contacts	
5.3				**Selection Criteria:** **CCB Priority = E2** **Sort Criteria:** **ISR # (Ascending)**
		ISR #	ISR Number	
		Title / Description	ISR Title; Change Description	
		ISR Notes	ISR Notes	Change from 'New MMIS Comments' to 'ISR Notes'.
		Users	Originator; DMAS Analyst Contacts	
5.4				**Selection Criteria:** **CCB Priority = E3** **Sort Criteria:** **ISR # (Ascending)**
		ISR #	ISR Number	
		Title / Description	ISR Title; Change Description	
		ISR Notes	ISR Notes	Change from 'New MMIS Comments' to 'ISR Notes'.
		Users	Originator; DMAS Analyst Contacts	
5.5	**List D ISRs – Required Post Implementation**			**Selection Criteria:** **CCB Priority = Beginning with 'D' (i.e. D1–D20)** **Sort Criteria:** **Priority (Ascending)**

				ISR # (Ascending)
		Priority	CCB Priority	
		ISR #	ISR Number	
		Title / Description	ISR Title; Change Description	
		ISR Notes	ISR Notes	Change from 'New MMIS Comments' to 'ISR Notes'.
		Orig/Users	Originator; DMAS Analyst Contacts	
6.1				**Report not required.** **List of approved ISRs sent by DMAS that have no response from First Health.**
6.2	**Overdue ISRs – Awaiting IM Analyst response after Division Director Approval**			**New report – low priority.** **Selection Criteria:** **ISR Status = Ready-Division Director Approved** **Request OK? = Blank** **Sort Criteria:** **ISR # (Ascending)**
		ISR #	ISR Number	
		ISR Title	ISR Title	
		DMAS Analyst	DMAS Analyst	
		Approved Date	Division Director Date	
		No. of Days Elapsed		Number of business days elapsed between current date and 'Approved Date'.
6.3	**Overdue ISRs – Awaiting Impact Assessment from First Health**			**New report – low priority.** **Selection Criteria:** **ISR Status = Ready-Division Director Approved** **Date Sent to FHS ('Impact Assessment' related field) has**

				date entered **Date Received from FHS ('Impact Assessment' related field) = Blank** **Sort Criteria:** **ISR # (Ascending)**
		ISR #	ISR Number	
		ISR Title	ISR Title	
		DMAS Analyst	DMAS Analyst	
		Date Sent to FHS	Date Sent to FHS (Impact Assessment related field)	
		No. of Days Elapsed		Number of business days elapsed between current date and 'Date Sent to FHS'.
6.4				Requirements to be investigated by Susan Spivey.
6.5				Requirements to be investigated by Susan Spivey.
6.6				Requirements to be investigated by Susan Spivey.
7.1	**Outstanding Overpayments ISRs**			**Selection Criteria:** **Payment Type = Overpayment** **Date Resolved = Null** **Sort Criteria:** **ISR # (Ascending)**
		ISR#	ISR Number	
		Title	ISR Title	
		Originator	Originator	
		Date Identified	Date Identified	

		No. of Days aged		Number of business days elapsed between current date and 'Date Sent to FHSC'.
7.2	**Outstanding Underpayments ISRs**			**Selection Criteria:** **Payment Type = Underpayment** **Date Resolved = Null** **Sort Criteria:** **ISR # (Ascending ISR # (Ascending)**
		ISR#	ISR Number	
		Title	ISR Title	
		Originator	Originator	
		Date Identified	Date Identified	
		No. of Days aged		Number of business days elapsed between current date and 'Date Sent to FHSC'.
7.3	**Resolved Over/Under Payments ISRs**			**Selection Criteria:** **Payment Type = Overpayment or Underpayment** **Date Resolved = True** **Sort Criteria:** **ISR # (Ascending**
		ISR#	ISR No.	
		Title	ISR Title	
		Originator	Originator	
		DMAS Analyst	DMAS Analyst	
		Over/Under Indicator	Overpayment / Underpayment	
		Date Identified	Date Sent to FHSC	Date Sent to FHSC.
		No. of Days aged		Number of business days elapsed between current date and 'Date Sent to FHSC'.
		Date Resolved	Date Resolved	Date Overpayment / Underpayment resolved.